



### Item Checklist for SBA Applications

Each applicant will be subject to individual credit evaluations according to Community Bank standards. The list of items below is general and not specific to any loan program which may require additional information. Business applicant refers to the Limited Liability Corporation (LLC), Corporation, Partnership, Sole Proprietor, and all guarantors requesting financial assistance.

Each Business Applicant should complete the following application documentation:

- \***SBA Form 1919** (Borrower Information) - For each “associate” of Business (definition at the top of the SBA form)
- \***SBA Form 413** (Personal Financial Statement) - Each principal and spouse owning 20% or more of the business  
Community Bank PFS can be used in lieu of SBA 413. Needs to be signed, dated and no more than 90 days old.
- \***Resume** - Anyone owning 20% or more of the business
- \***Two Year Projected Financials** - For existing and newly established business applicant
- \***Business Indebtedness Form** - For existing business applicant only
- \* **3 years of personal tax returns for the guarantors/principal owners of the business, whether it is a new or existing business are needed with each application.**

\*Each form is available at: <http://communitybank.net/sba/>

- If business applicant is an **existing** Limited Liability Corporation (LLC), Corporation, Partnership, or Sole Proprietor, and all guarantors please provide the following:
  - a. Business Tax Returns for the last 3 years (signed and dated)
  - b. Personal Tax Returns for the last 3 years (signed and dated)
  - c. History and Description - Brief history explanation (including length of time in business and ownership)
  - d. Business Financials:
    - i. Balance Sheet (no more than 90 days old; signed and dated)
    - ii. Income Statement (no more than 90 days old; signed and dated)
- If business applicant is a **newly established** Limited Liability Corporation (LLC), Corporation, Partnership, or Sole Proprietor, and all guarantors please provide the following:
  - a. Owner’s Injection
  - b. Business Plan
- If business applicant or principals share any common ownership with another business, please provide the following:
  - a. Business Tax Returns for the last 3 years for each business (signed and dated)
  - b. Balance Sheet (no more than 90 days old) for each business (signed and dated)
  - c. Income Statement (no more than 90 days old) for each business (signed and dated)

#### Other Items (as they apply)

- Life Insurance
- Lease (proposed)
- Franchise Agreement / Certificate of No Change
- Purchase Agreement
- Purchase Quotes / Construction Estimates
- Articles of Incorporation / Business Agreement
- Plans / Specifications
- Copies of licenses (i.e. Lawyer, Engineer, Doctor, etc.)

All forms are subject to change and / or expire without notice. Visit [SBA.gov](http://SBA.gov) for additional information.