

Loan Application Checklist



General:

1. Community Futures Loan Application Form
2. Business Plan
3. Proforma Cash-Flow Statement(s)
4. Verification of Personal Investments
5. Comprehensive list of assets to be used as security
**Note: requires proof of ownership (registration/ bills of sale, etc.)*
6. Information Collection Notice and Authorization Form

Required as Applicable:

7. Signed offers to purchase
 - Business
 - Building
 - Land
 - Equipment
 - Renovations
 - Building Construction
 - Other.....
8. Copy of mortgages (residential, business, other real estate)
9. Tax Assessment, Appraisal, or Realtor's Assessment of all
10. Comprehensive list if all tools/ equipment owned and to be purchased
**Note: Include Serial Numbers if applicable*
11. Lease agreement (if applicable)
12. Copy of Trade Certificate (if applicable)
13. Provincial/ Municipal License
14. Adequate Life Insurance (for the amount of the loan)

Existing Business Also Require:

15. Financial Statements for the past 2-3 years as requested
16. Copy of Personal Tax Return
17. Aged list of all Accounts Receivable and Accounts Payable
18. GST and Business number

Incorporated Companies Also Require:

19. Copy of incorporation/registration
20. Copy of Corporate Tax return (if available)

***PLEASE REMIT WITH LOAN APPLICATION**