

Loan Application Package Checklist



START-UPS and NEW BUSINESSES	Loan Application JEDCO form
	Personal Financial Statement JEDCO form
	2 years personal tax returns
	Business plan
	2 years monthly revenue and expense projections with assumptions
	Requested loan amount and detail of how the funds will be used

EXISTING BUSINESSES	Loan Application JEDCO form
	Personal Financial Statement JEDCO form
	2 year corporate tax returns **
	Interim financial statements
	2 years personal tax returns for all owners and guarantors

** if tax returns are not prepared for most recent fiscal year, then application package must include year-end company-prepared balance sheet and income statement

Include these items if available at the time of application	Purchase contract (for real estate)
	Construction cost budget JEDCO form: <i>504 Eligible Costs Worksheet</i>
	Vendor quote or invoice (for equipment)
	Articles of incorporation and by-laws (corporations)
	Articles of organization and operating agreement (LLCs)

Please note, this checklist is not inclusive of all required application documents. These items are the minimum requirements for your loan application to be reviewed. Additional items will be requested prior to closing or prior to submission to the SBA.