



## Microloan Program Checklist

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This checklist will help you identify and gather the documentation needed to start the loan process. Additional documents may be required to clarify or support the loan request.

### From Your Business

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- Articles of incorporation, Articles of Organization, Partnership Agreement, etc.**
  - Operating Agreement as an LLC
  - By-Laws as a Corporation
  - Certificate of Assumed Name as a Sole Proprietorship
- EIN Letter**
- 2 most recent years business tax returns**
- Business Debt Schedule**
- Profit and Loss Statement**  
*(if most recent tax returns are not available yet or dated financials are > 6 months)*
- Balance Sheet**  
*(if most recent tax returns are not available yet or dated financials are > 6 months)*
- Beneficial Ownership Form**  
*(template provided in online application)*

### From Each Individual Owner and/or Guarantor

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- 2 most recent years personal tax returns**
- Personal Financial Statement**  
*(template provided in online application if needed)*
- Schedule K-1**  
*(if own multiple businesses)*
- W-2**  
*(if applicable)*