



Questions:

1. What is the purpose of this loan?
2. What is the desired loan amount?
3. What is the borrowing entity?

Collateral:

1. Purchase contract
4. Valuation (if already available)

Help Agility Get to Know You:

1. What is your business name and description?
2. What is your background and business history?
3. What makes your business successful?

Principals and/or Guarantors:

1. Who are the primary principals and authorized borrowers for your business?
2. Please provide a brief biography and background on each principal or authorized borrower.

Documents:

1. Three years of business tax returns
2. Two years principal/guarantor tax returns
3. Current balance sheet
4. Current P&L statement