

Microloan Document Checklist



Full Name: _____ Date: _____ County: _____

Business Name: _____ Phone: _____

Email: _____ Mobile: _____

Years/Months in Business: _____ Credit Score: _____ Amount Request: \$ _____

Loan Type Requested: **Vehicle** **Equipment** **Inventory** **Line of Credit** **Secured Credit Card**

All items listed below (package*) are to be submitted at the same time. You will be connected to one of our Small Business Consultants for submission instructions.

Each document is to be numbered and submitted in order per the list below and must include the applicant's original signature and date.**	✓	START UP*** 36 MONTHS or LESS	EXISTING BUSINESS (3YRS+)
1. Completed, signed and dated Business Microloan Application.		Required	Required
2. Copy of the Driver's License.**		Required	Required
3. Completed, signed and dated Personal Financial Statement.**		Required	Required
4. Business Plan.		Required	Varies
5. Completed, signed and dated Projections.		Required	Required
6. Previous two (2) Years complete and signed Tax Returns For Company.		If Available	Required
7. Previous two (2) Years of Company's Detailed Income Statements and Company Balance Sheets signed and dated .		If Available	If Available
8. Company's Current Detailed Year to Date Income Statement and Balance Sheet as of the Most Recent Month End signed and dated .		If Available	Required
9. Previous two (2) Years complete, signed and dated Personal Income Tax Returns.**		Required	Required
10. Resumes of all the owners and management team.**		Required	Required
11. Documentation of business oriented course completion from a Suncoast approved agency/community partner, incubator program or mPower Small Business Essential module.		Required	If Available
12. Other Documents / Information requested.		Required	Required

For more information go to www.suncoastcreditunion.com/microloans or email us at microloans@suncoastcreditunion.com

Notes

* Incomplete packages will not be accepted.

** Documents are required for anyone who has 20%+ ownership of the company.

*** Start Up is defined by business less than three years old.