

Business Loan Checklist

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1. Narrative on your business

Your business cannot be summed up by a single number. Your history, your future, and how you've positioned your business for future growth tell a story that goes beyond ink, paper, and a credit score. Prepare a narrative that includes your business's ownership history, customer base, business operations, and future plans to allow CCG to best understand your needs.

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2. Tax returns or financial statements from last two years

This allows us to see how your business has performed; revenue trends, profitability, cash flow and ability to repay, and any swings that have occurred in the past.

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3. A recent interim financial statement

Accountant Prepared, QuickBooks or Bank Statements provides a current snapshot of your financial condition, revenues, profits and cash flow to provide a more holistic view of your business's health and trajectory.

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4. Invoice for equipment being purchased

In order to provide the best and most appropriate loan structure for you, we require an invoice for the equipment you are purchasing. This allows us to accurately understand and value the equipment that is being purchased.

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5. Credit references and contact information

References show your history with other creditors, payment histories and management of similar debt to help determine creditworthiness.

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6. Signed credit authorization and contact information

Providing a signed credit authorization allow us to run credit reports on you and your business.