

Financing Partner Checklist



Understanding Your Business

1. Does the lender have other customers that operate in your industry? ☐ Yes ☐ No
2. How long has the lender been serving your industry? _____

Services Provided

Does this lender provide the following financial products?

- | | | | |
|---------------------------------|--------------------------|-----|-----------------------------|
| • New equipment loans | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • New equipment leases | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • Used equipment loans | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • Used equipment leases | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • Refinancing | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • Debt consolidation | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • Working capital loans | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |
| • Accounts receivable financing | <input type="checkbox"/> | Yes | <input type="checkbox"/> No |

Equipment Knowledge

1. Does the lender often finance the type of equipment you are purchasing? ☐ Yes ☐ No
2. Does the lender finance new and used equipment? ☐ Yes ☐ No

Relationship Building

1. Does the lender have a local industry-dedicated representative that will come to your facility to meet with you? ☐ Yes ☐ No
2. Do you need to go to the lender to sign papers? ☐ Yes ☐ No
3. Is there a representative that will answer your telephone call? ☐ Yes ☐ No