

## Checklist

---

To make things easier for you, here is a checklist of required information for Business Owner Occupant loans:

- ☐ Three years year-end financial statements, including balance sheet and income statement (applicant) or Federal Tax Returns.
- ☐ Current financial statement (applicant)
- ☐ Personal financial statement (guarantor)
- ☐ Two years tax returns, including all schedules and K-1s (guarantor)
- ☐ Purchase agreement
- ☐ Loan application
- ☐ Trust documents (if borrower or guarantor is a trust)