



Sole Proprietor or Partnership Loan/Line of Credit Information Checklist

Request and Borrower information:

1. Overview of loan or line of credit request (amount, purpose, payback period)
2. Borrower legal name and structure / ownership information

Supporting Documents:

1. Last two years T1 Generals (full tax return)
2. Most recent Property Tax Assessments and recent mortgage statements
3. Recent bank/investment statements showing cash/savings on hand
4. Completed and signed net worth statement