

LP 7 Lender Documents Checklist

Name _____

Directions: As you prepare to meet with a lender, you will need to compile key financial documents. Use this checklist to help you record the documents that you have already assembled.

- Business Plan
- Income Statement for any business you own
- Cash Flow Budget
- Tax Returns
 - Obtain your federal tax returns for the past 3 years.
- Credit Reports
 - Obtain your current credit report from one of the major credit bureaus or from www.annualcreditreport.com or www.creditkarma.com (which gives it for free.)
- Balance Sheet
- Statement of Personal Assets and Debts
- Production Histories – often 3 years