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## Financial Package Requirements

*(Required on credit submissions over \$50K)*

### 1. Transaction Summary

- A completed credit application with all business owners information
- A brief description of the equipment (year, make, model, serial #, etc.)
- Copy of invoice or proposal of equipment is it new, used or refurbished?

### 2. Purpose of Transaction

- Brief explanation of purpose (I.E. purchase equipment, reduce overhead, increase production, refinance existing debt, replace old equipment, etc.)
- Is the equipment necessary for the business to function?

### 3. Financial Statements for Borrower

- 2 years of compiled, reviewed or audited business financial statements
- Year-to-date business interims (profit & loss and balance sheet)
- 2 year business tax returns (if business financial statements are not available)
- Personal guarantee's will be required on all approvals, with minor exceptions
- 2 years personal tax returns (full return) on all business owners
- Current personal financial statement on all business owners

### 4. Additional References

- Comparable Debt Reference (Lease or Loan for similar amount)
- Business Bank Statements (last 3 months current)
- Trade (Supplier) References
- Landlord and Insurance information