



## Microbusiness Loan Documentation Checklist

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To evaluate your loan request as quickly as possible, you, as the applicant, are to provide the following documentation:

1. Completed Small Business Loan online application
2. Business Plan – required for all start-ups; if existing business (2 years or more) the [Executive Summary](#) document is required if no business plan exists.
3. [Estimated Project Cost and Source of Funds](#)
4. [Business Cash Flow Projections for 12 months](#)
5. [Start-Up Balance Sheet](#) (start-ups only)
6. Year-to-Date Profit and Loss Statement and Balance Sheet for existing businesses
7. [Global Debt Service Form](#)
8. Two most recent years tax returns (personal and business) with all schedules and W-2's for all filers.
9. [Business Debt Schedule](#)
10. [Signed and Dated Personal Financial Statement \(PFS\)](#) – if owner is married, PFS should include the spouse
11. Two most recent bank statements (personal and business)
12. Resume of applicant(s) and/or guarantor(s)
13. Copy of a government issued photo ID for all applicant(s)
14. Three personal references

\*The underlined items are hyperlinks to applicable forms.

Applications are not considered complete until all documents are submitted. If you need assistance with any of the required documents, a representative from CommunityWorks can assist you with any questions you may have.

**Contact CommunityWorks' Loan Officers:**

**Email: [loaninfo@cwcarolina.org](mailto:loaninfo@cwcarolina.org)**

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