

SBA Loan Document List - Buyer

Tax & Downpayment Information (For Each Investor)

- 3 Years Tax Returns (for all investment partners)
- 3 Years W-2
- Documents Showing Down Payment Source
- 3 Months of Account Statements (For all accounts used to fund Down Payment)
- Personal Financial Statement (PFS) if already created
- Management and Business experience resume

Home Mortgage Information (For Each Investor)

Purchase Date _____

Purchase Price _____

Current Market Value _____

Monthly Mortgage Payment _____

Current Outstanding Balance _____

OR Monthly House Rent _____

