

SBA Loan: Quick Start Assessment



Powered by:



Personal Information

Full Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____

Work Phone: _____ Fax: _____

Email: _____

Are you a citizen of the USA? Yes No

If no, do you have an alien registration card (green card)? Yes No

Confidential Personal Information

What is your credit score? _____

(If you don't have your credit score, you can get it at myfreecreditreport.com or creditkarma.com)

Have you ever been convicted of any misdemeanor or felony? (Other than a minor traffic violation) Yes No

If yes, please explain:

Have you or a corporation owned or controlled by you ever been involved in a bankruptcy?

Yes No

If yes, please explain:

Are you currently involved in any lawsuits or legal actions, either as a plaintiff or defendant?

Yes No

If yes, please explain:

Education Level

Years of schooling: 1 - 12 13 - 16 Over 16

Degrees: High School College Grad/Post Grad

Last Degree Earned: _____

Employment Information

Current Employer: _____

Employed Since: _____ Will you remain employed? Yes No

Address: _____

City: _____ State: _____ Zip: _____

Work Phone: _____ Work Fax: _____

Position: _____ Annual Income: _____

Spouse's Employer: _____

Employed Since: _____

Position: _____ Annual Income: _____

Business Information

Will there be a co-borrower (spouse) or anyone owning more than 20% of the business?

Yes No

Have you identified a business you're interested in? Yes No

If yes, what is the name of the business? _____

Is this a new or existing business? New Existing

What is your total project cost (if known)? _____

Assets and Liabilities

ASSETS		(Omit Cents)	LIABILITIES		(Omit Cents)
Cash on hand & in Bank(s).....	\$	_____	Accounts Payable.....	\$	_____
Savings Account(s)	\$	_____	Notes Payable to Banks and Others.....	\$	_____
IRA or Other Retirement Account	\$	_____	<i>(Describe in Section 2)</i>		
Accounts & Notes Receivable	\$	_____	Installment Account (Auto).....	\$	_____
Life Insurance - Cash Surrender Value Only	\$	_____	Mo. Payments	\$	_____
Stocks and Bonds	\$	_____	Installment Account (Other).....	\$	_____
Real Estate	\$	_____	Mo. Payments	\$	_____
<i>(Describe in Section 3)</i>			Loan on Life Insurance.....	\$	_____
Automobiles - Total Present Value	\$	_____	Mortgages on Real Estate.....	\$	_____
Other Personal Property	\$	_____	<i>(Describe in Section 3)</i>		
Other Assets	\$	_____	Unpaid Taxes	\$	_____
			Other Liabilities	\$	_____
			Total Liabilities	\$	_____
			Net Worth	\$	_____
			Total	\$	_____
			Total	\$	_____

Notes Payable

Section 2. Notes Payable to Banks and Others. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)					
Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral

Real Estate

Section 3. Real Estate Owned	(List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)		
	Property A	Property B	Property C
Type of Real Estate (e.g. Primary Residence, Other Residence, Rental Property, Land, etc.)			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Amount of Payment per Month/Year			

Annual Income and Expenses

Annual Income	Applicant	Joint Applicant (spouse or co-borrower)	Annual Expenditures	Applicant	Joint Applicant (spouse or co-borrower)
Salary			Rent/Mortgage Payment		
Dividend/Interest Income			Property Taxes		
Rental Income			Utilities		
Alimony/Child Support			Insurance (home/auto)		
Other (detail):			Alimony/Child Support		
			Personal Expenses		
			Income Taxes		
			Other		
TOTAL INCOME			TOTAL EXPENDITURES		

Anticipated Annual Income from New Business (if known): _____