



Tri-State Funding Group
If You Need Business Funding--We Can Help!



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As a business owner, you should regularly review and evaluate your financial records and business reports to accurately measure the progress of your operations--otherwise, you will never have an honest assessment of your overall business performance. So do yourself a favor and get the following documents organized, saved, and stored in a digital folder that you can access and evaluate at any time.

Here's a Good List to Start:

- **A copy of a valid ID (driver's license or current passport).**
- **Acquire, review and know your FICO (credit) score.**
- **Three to six months of business bank statements.**
- **Current and signed Profit and Loss statements (within 60 days).**
- **Business financial statements and tax returns--up to three years.**
- **Business license or certificates required to conduct your business.**
- **Copies of agreements with suppliers and clients.**
- **Copy of office lease or statement from landlord on terms.**
- **Franchise agreements (if applicable).**
- **Copies of current and past funding applications.**
- **Ownership structure and any partner affiliations.**
- **Personal resume including business experience of each principal.**

In most cases, you will only need a few of the items of this list during the initial loan application process. With that in mind, my goal is to help you prepare for the process so that you will have the documents readily available to submit to any outside organization that may require one or more of your records listed above.

Download and save this document or print and post it near your desk as a guide to get your records and yourself organized

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