



# Financial Disclosure Checklist

- Credit Application**  
Completed and Signed by Officer(s)
- Overview of Organization**  
2-pages max - plus brochures, resumes, etc. (or substitute link to website)
- Equipment Description**  
Sales Contract, Invoice, Quote, or Purchase Order detailing Equipment specs
- Year-End (YE) Financial Statements for Business**  
Most recent Two Years
- Current Interim Financial Statement for Business**  
Needed if YE Financial Statement is more than 6-months old
- Current Debt Schedule**  
Summary of all long term debt and expiration
- Tax Returns for Business**  
Most recent Two Years needed if YE Financials are not Audited or Reviewed
- Tax Returns of Owner(s)**  
Most recent Two Years needed for each Person or Entity owning 20+% equity
- Current Financial Statement of Owner(s)**  
Needed for each Person or Entity owning 20+% of the company
- Other Pertinent Information**  
Contracts, References, Pro-Forma to be considered for credit approval



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