



Lending Minimum Required Documents (MRDs)

MRDs for All Loans - \$25,000 and up

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- Most recently filed three years of business tax returns.
- Most recently filed personal tax returns for the past year.
- All business license(s) required by law for your state/industry.
- Business owner's government-issued photo ID(s) – cannot be a photocopy.
- [List of collateral over \\$5,000.](#)
- [Personal Financial Statement \(SBA Form 413.\)](#)
- Proof or Certificate of Insurance for any type of [insurance required for your industry or location.](#)
- *Additional items may be required depending on eligible financing program.*

Additional MRDs for Loans over \$350,000

Business Acquisition

3 Years Seller's Business Tax Returns
Draft or Final Purchase Agreement*
SWOT / Business Plan / Business Summary
Interim Financials
Amount of Equity Injection & Source
2 Year Projections with Assumptions

*If it's only a Draft, this does not constitute a "Rush"

Tenant Improvement

Amount needed for TI
Amount of Equity Injection & Source
Contractor Agreement with
Cost Breakdown
Permit or Permit Application

Working Capital

No additional requirements

Inventory or Equipment Purchase

Equipment / Inventory Quote or Invoice
Amount of Equity Injection & Source

CRE Purchase

LOI or Draft Purchase Agreement
Amount of Equity Injection & Source

Business Debt Refinance

Connect business accounts showing
last 12-months payment history on
debt(s) being refinanced
Original Note & any agreement
to change terms for each debt
being refinanced



Lendistry SBLC, LLC is approved to offer
SBA loan products under SBA's 7(a)
Lender Program