



Lending Minimum Required Documents (MRDs)

LOAN PRODUCT MRDs

Standard MRDs
Loan Application
Business Debt Schedule
2 Years Business Tax Returns
2021 YE Business Financials*
2 Years Personal Tax Returns
3 months Business Bank Statements or PLAID
Government Issued ID (Driver's License)
PFS (SBA Form 413 -all households)

SBA MRDs
Loan Application
Business Debt Schedule
3 Years Business Tax Returns
3 Years Personal Tax Returns
2021 YE Business Financials*
3 months Business Bank Statements or PLAID
Government Issued ID (Driver's License)
PFS (SBA Form 413 - all households)

CRE MRDs
Loan Application
Business Debt Schedule
2 Years Business Tax Returns
2 Years Personal Tax Returns
3 months Business Bank Statements or PLAID
Government Issued ID (Driver's License)
PFS (SBA Form 413 - all households)

USE OF PROCEEDS MRDs

Business Acquisition
Loan Product MRDs
3 Years Seller's Business Tax Returns
Offer Letter/LOI/Draft Purchase Agreement
Management Resume
SWOT/ Business Plan/ Business Summary
Amount of Equity Injection

Tenant Improvement
Loan Products MRDs
Amount needed for TI
Amount of Equity Injection

Inventory or Equipment Purchase
Loan Product MRDs
Equipment/Inventory Quote or Invoice
Amount of Equity Injection

CRE Purchase
Loan Products MRDs
LOI or Draft Purchase Agreement
Amount of Equity Injection

Business Debt Refinance
Loan Products MRDs
Debt to be refinanced (identified on Business Debt Schedule)

Business Type MRDs

Franchise
Loan Product MRDs
LOI of Franchise Agreement
OR
Franchise Disclosure Document and
Business Plan (if Start-Up)
SBA Franchise Directory Look Up

Start-up
Loan Products MRDs
Business Plan
Owners' Resume (Relevant Business Experience)
2 Year Projections (month to month)
Draft Lease (Executed Lease needed before Closing)
Amount of Equity Injection



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