

# Pre-Qualification Checklist

## Ownership Information

- Completed Credit Application

### **For All Individuals / Spouses with 20% or More Ownership, Please Provide:**

- Completed Personal Financial Statement
- 3 Years Personal Federal Tax Returns

## Project Information

- Summary of Project Cost (form attached)

## Business Information

### **(For Borrowing Entity & All Entities owned 20% or More by Owners)**

- 3 Years Business Federal Tax Returns & Financials (balance sheet, profit & loss)
- Current Year to Date interim business financials (balance sheet, profit & loss)
- Schedule of Business Debt (form attached)

### **PLEASE RETAIN COPIES OF ALL DOCUMENTS FOR YOUR RECORDS.**

The Equal Credit Opportunity Act (ECOA) and Fair Credit Reporting Act (FCRA) require creditors to retain all documents provided in credit application packages for a period of at least 12 months from the date of application. We do not provide copies.

**Coast Commercial Credit™**

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