

Appointment Checklist

All Requests

If a Corporation - Articles of Incorporation and Corporate By-Laws

If a Partnership - Partnership Agreement

If a Limited Liability Corporation (LLC) - Articles of Organization and Operating Agreement

If a Business Entity – Tax Identification/Employer Identification number

Existing Business

- _____ Last 3 years of fiscal year-end balance sheets
- _____ Last 3 years of income statements
- _____ Cash Flow projections
- _____ Signed personal financial statement
- _____ Last 3 years of personal and business federal tax returns

Business Acquisition

- _____ Last 3 years of fiscal year-end balance sheets
- _____ Last 3 years of income statements
- _____ Signed personal financial statement
- _____ Last 3 years federal tax returns on the business
- _____ Last 3 years federal tax returns on individual
- _____ Signed purchase agreement
- _____ Projections for at least one year - cash flow

Start-Up Business

- _____ Detailed business plan
- _____ Signed personal financial statement
- _____ Last 3 years federal tax returns on individual
- _____ Projections for at least one year - cash flow