

UBank

Small Business Loans

DOCUMENT CHECKLIST

1. Company Documents
 - *Certificate of Formation or Articles of Incorporation*
 - *IRS Assignment of EIN*
 - *Company Agreement or Bylaws (Not required if single member)*
 - Driver's License for All Members or Managers
 - SSN, Phone Number, and Email for All Members or Managers.
2. Driver's License For All Guarantors
3. 3 Years of Personal Tax Returns
4. Personal Financial Statement
5. 3 Years of Business Tax Returns
6. Balance Sheet & Income Statement For Business (Year to Date)
7. Debt Schedule
8. SBA Questionnaire
9. Business Plan