

# SBA Loan: Quick Start Assessment



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**Personal Information**

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Home Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Are you a citizen of the USA?      Yes      No

If no, do you have an alien registration card (green card)?      Yes      No

**Confidential Personal Information**

What is your credit score? \_\_\_\_\_

*(If you don't have your credit score, you can get it at [myfreecreditreport.com](http://myfreecreditreport.com) or [creditkarma.com](http://creditkarma.com))*

Have you ever been convicted of any misdemeanor or felony? (Other than a minor traffic violation)      Yes      No

If yes, please explain:

Have you or a corporation owned or controlled by you ever been involved by a bankruptcy?

Yes      No

If yes, please explain:

Are you currently involved in any lawsuits or legal actions, either as a plaintiff or defendant?

Yes      No

If yes, please explain:

## Education Level

Years of schooling:    1 - 12            13 - 16            Over 16

Degrees:    High School            College            Grad/Post Grad

Last Degree Earned: \_\_\_\_\_

## Employment Information

Current Employer: \_\_\_\_\_

Employed Since: \_\_\_\_\_ Will you remain employed?    Yes    No

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Work Fax: \_\_\_\_\_

Position: \_\_\_\_\_ Annual Income: \_\_\_\_\_

Spouse's Employer: \_\_\_\_\_

Employed Since: \_\_\_\_\_

Position: \_\_\_\_\_ Annual Income: \_\_\_\_\_

## Business Information

Will there be a co-borrower (spouse) or anyone owning more than 20% of the business?

Yes    No

Have you identified a business you're interested in?    Yes    No

If yes, what is the name of the business? \_\_\_\_\_

Is this a new or existing business?    New    Existing

What is your total project cost (if known)? \_\_\_\_\_

## Assets and Liabilities

ASSETS		(Omit Cents)	LIABILITIES		(Omit Cents)
Cash on hand & in Banks.....	\$	_____	Accounts Payable.....	\$	_____
Savings Accounts .....	\$	_____	Notes Payable to Banks and Others.....	\$	_____
IRA or Other Retirement Account .....	\$	_____	<i>(Describe in Section 2)</i>		
Accounts & Notes Receivable .....	\$	_____	Installment Account (Auto).....	\$	_____
Life Insurance - Cash Surrender Value Only	\$	_____	Mo. Payments \$	_____	
Stocks and Bonds .....	\$	_____	Installment Account (Other).....	\$	_____
Real Estate .....	\$	_____	Mo. Payments \$	_____	
<i>(Describe in Section 3)</i>			Loan on Life Insurance.....	\$	_____
Automobiles - Total Present Value	\$	_____	Mortgages on Real Estate.....	\$	_____
Other Personal Property	\$	_____	<i>(Describe in Section 3)</i>		
Other Assets	\$	_____	Unpaid Taxes .....	\$	_____
			Other Liabilities .....	\$	_____
			Total Liabilities .....	\$	_____
			Net Worth .....	\$	_____
			<b>Total</b>	\$	_____
			<b>Total</b>	\$	_____

## Notes Payable

Section 2. Notes Payable to Banks and Others. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)					
Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral

## Real Estate

<b>Section 3. Real Estate Owned</b>	(List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)		
	<b>Property A</b>	<b>Property B</b>	<b>Property C</b>
Type of Real Estate (e.g. Primary Residence, Other Residence, Rental Property, Land, etc.)			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Amount of Payment per Month/Year			

## Annual Income and Expenses

Annual Income	Applicant	Joint Applicant (spouse or co-borrower)	Annual Expenditures	Applicant	Joint Applicant (spouse or co-borrower)
Salary			Rent/Mortgage Payment		
Dividend/Interest Income			Property Taxes		
Rental Income			Utilities		
Alimony/Child Support			Insurance (home/auto)		
Other (detail):			Alimony/Child Support		
			Personal Expenses		
			Income Taxes		
			Other		
<b>TOTAL INCOME</b>			<b>TOTAL EXPENDITURES</b>		

Anticipated Annual Income from New Business (if known): \_\_\_\_\_

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