



CORPORATE OFFICE • 35 PLAINS ROAD • P.O. BOX 950 • ESSEX, CT 06426

TELEPHONE: (860) 767-4414 • FAX (860) 767-4411

### Business Loan Credit Application Checklist

Thank you for your interest in obtaining a business loan with Essex Bank. We will require the list of financial documents below in order to review a business loan request.

- Two (2) years current Business Tax Returns (complete with all schedules) and CPA Statements (if available) for Borrower and Corporate Guarantors.
- Two (2) years current Personal Federal Tax Returns – complete with all schedules for each Individual Guarantor.
- Personal Financial Statement for each Individual Guarantor.
- Business Year-To-Date Profit & Loss and Balance Sheet for the current fiscal year.
- Current Accounts Receivable and Accounts Payable agings for the Borrower.
- Inventory Reports and Equipment valuations for the Borrower – if applicable.
- Current Rent Roll for Investment Properties – if applicable.
- Listing of Other Business Obligations.
- Copy of Purchase and Sales Agreement/Bill of Sale – if applicable.

Please contact a commercial lender to schedule an appointment.

Thank you for choosing Essex Bank!