



Reno Office
Phone: 775-770-1240
Toll free: 800-726-2494

Las Vegas Office
Phone: 702-877-9111
Toll free: 877-732-7101

www.nsd.com

Preliminary Application Checklist

Business/Affiliate Information

- Loan Application & Business Profile (forms provided)
- Year-end business financial statements for last 3 years (balance sheet and profit & loss statements)
- Interim financial statements (within 60 days) and schedule of A/R and A/P
- Signed Federal tax returns for last 3 years with all schedules and K-1's
- Projected P & L with increased employment expenses and brief written supporting assumptions (form available)
- Business debt schedule (form available)
- If any affiliated businesses – signed Federal taxes for last 2 years with all schedules and K-1's
- Organizational documents and stamped Secretary of State documents of operating company

Personal Information for any owner of business and/or real estate with a 20% or more ownership interest or any managing member/partner

- Personal financial statement (form provided)
- Signed, personal tax returns for last 3 years with all schedules and K-1's
- Resume for owners and key employees (form available)
- SBA 912 Personal History Form (form provided)
- Copy of Certificate of Trust from personal/family trust

Real Estate/Equipment Information

- Real estate purchase agreement and any associated CC&Rs
- Organizational documents and stamped Secretary of State documents of land-holding entity
- If construction/remodeling, line-item construction cost budget, floor plan, and description of improvements
- If equipment, furniture, and furnishings, bids/ written estimates (if financed)
- Existing environmental reports (if available)

Additional forms are available at www.nsd.com under "Application Forms" tab