



## Application Needs List

At a minimum the following items are needed in order for Alliance to be able to perform an initial review of a loan request.

**Alliance Loan Application** – *must use Alliance's Loan Application*

**Financials** – **must have complete returns** with all schedules including K1 statements – please sign and date all returns and interim's (**use blue ink**)

1. Interim Financials – signed and dated within 30 days of Application
2. Most recent 3 years Personal Tax Returns (federal only) on all guarantors (anyone holding a 20% or more ownership)
3. Most recent 3 years Business Tax Returns on Business and all affiliate companies
4. Affiliate Companies Interim Financial Statements
5. Personal Financial Statements (signed and dated within last 30 days) on all guarantors
6. Business Debt Schedule – signed and dated, need for all affiliate companies as well (please use Alliance form)

In order **to submit a Loan Request to Underwriting** we will need **all** of the following forms.

1. Alliance Credit Authorization
2. Management Resume – please use Alliance form
3. SBA Personal History – form 912 signed and dated
4. 4506 T – signed and dated
5. History of Business or Business Plan if a new purchase
6. Digital Photos of Subject Property – need outside and inside color photos

### Miscellaneous Items:

- Detailed Property Description
- Photo ID's on all Borrowers/Guarantors – need good clear copy
- Copy of Purchase Agreement if loan is for a new purchase
- Copy of any existing Appraisal

Please email all documents to [allianceloans@msn.com](mailto:allianceloans@msn.com).