BRIDGEWAY CAPITAL

LOAN APPLICATION CHECKLIST

Use our checklist to help complete your application and gather the documentation needed to submit a successful loan request.

ALL LOANS

Please submit the following documents with your loan request.

Additional information may be requested.

- [x] Connect with Bridgeway
- [ ] Complete loan application
- [ ] Fill out intake form
- [ ] Profit & Loss Statement (YTD)
- [ ] Balance Sheet (YTD)
- [ ] Business Debt Schedule
- [ ] Business entity documents
- [ ] Lease (if renting)
- [ ] Proof of owner equity
- [ ] Invoices (if applicable)
- [ ] Payoff letters (if applicable)
- [ ] Fictitious Name Filing (if applicable)

BUSINESS LOANS

When requesting a business loan, please submit the following documents in addition to the information needed for all loans.

Additional information may be requested.

- [ ] Personal Financial Statement
- [ ] 3 Years Business Tax Returns
- [ ] 3 Years Personal Tax Returns
- [ ] Credit Report
- [ ] If a LLC: Certificate of Organization (stamped by the State) and Operating Agreement or Sole Member Statement
- [ ] If a Corporation: Articles of Incorporation (stamped by the State) and By-Laws
- [ ] If starting acquiring or expanding a business:
  - Business Plan
  - 3 Year Projections
  - Sales Agreement (if acquisition)

NONPROFIT LOANS

When requesting a nonprofit loan, please submit the following documents in addition to the information needed for all loans.

Additional information may be requested.

- [ ] 3 Years 990's
- [ ] EIN Assignment Letter (if applicable)
- [ ] 3 Years Audited Financial Statements (if available)
- [ ] 501(c)(3) or 501(c) Determination
- [ ] Summary of organization (including demographics)

REAL ESTATE LOANS

When requesting a real estate loan, please submit the following documents in addition to the information needed for all loans.

Additional information may be requested.

- [ ] Sales Agreement with borrower name listed as buyer
- [ ] Property Appraisal on loan requests over $700,000
- [ ] Construction budgets and estimates (if applicable)
- [ ] Contractor information (if applicable)
- [ ] Rent roll for rental properties
- [ ] Property management information