

# SBA Loan Document List – Buyer

## **1. Tax & Down payment Information (For Each Investor)**

3 Years Tax Returns (for all investment partners)

3 Years W-2

Documents Showing Down Payment Source

3 Months of Account Statements (For all accounts used to fund Down Payment)

Personal Financial Statement (PFS) if already created

Management and Business experience resume

## **2. Home Mortgage Information (For Each Investor)**

Purchase Date \_\_\_\_\_

Purchase Price \_\_\_\_\_

Current Market Value \_\_\_\_\_

Monthly Mortgage Payment \_\_\_\_\_

Current Outstanding Balance \_\_\_\_\_

**OR** Monthly House Rent \_\_\_\_\_