



CALIFORNIA COASTAL
RURAL DEVELOPMENT CORPORATION
www.calcoastal.org

INFORMATION CHECKLIST

THE FOLLOWING INFORMATION IS REQUIRED TO PROCESS YOUR LOAN APPLICATION. SOME INFORMATION MAY NOT BE APPLICABLE TO YOUR BUSINESS. IF YOU ARE UNCERTAIN, PLEASE CONTACT THE LOAN OFFICER.

1. **Brief History of Your Business** — (form enclosed if desired) The nature of business, number of employees, location, and how long you have operated. If this is a loan request for a start up business and you have developed a business plan, much of this information is probably incorporated in that document. Please provide a copy if one has been prepared.
2. **Brief Resume of Management** — (primarily yourself) To demonstrate that you have the skills to operate this business. Include any information on special licenses or degrees obtained.
3. **Personal Financial Statement** — (form enclosed) One for each 20% or greater owner of the business.
4. **Personal Tax Returns** — Three years for all persons completing the personal financial statement form, even if income and circumstances have changed substantially.
5. **Interim Business Financial Statement** — This should include a balance sheet and an income statement and be dated within 60 day of application.
6. **Year End Business Financial Statements** — Three years if applicable and both balance sheet and income statements if available.
7. **Business Tax Returns** — If you do not operate as a sole proprietor -- submit 3 years.
8. **Projections** — Financial projections for 3 years if the business is a start up or is substantially changing its strategy.
9. **Debt Schedule** — List of all business debt including leases (form provided)
10. **Organizational Documents** — Fictitious name statement, partnership agreement and/or articles of incorporation whichever is appropriate for your business.
11. **Description of Project** — Include all costs associated with project and all sources of funding. Also Include any purchase agreements, cost breakdowns or vendor's estimates as applicable.
12. **Copy of Lease Contracts** — Include a copy all land leases.

YOU MAY BE REQUESTED TO PROVIDE ADDITIONAL
INFORMATION DEPENDENT UPON YOUR PARTICULAR SITUATION