



## NYC LMI Storefront Loan

### Document Checklist

If your initial loan application meets the program and credit guidelines, you will be invited to submit a complete application consisting of the documents noted below. You will be given access to Pursuit's online document upload portal via email. Please provide all items listed below via Pursuit's online portal for full underwriting of your loan request.

To download the following templates, click here <https://pursuitlending.com/nyc-lmi-storefront/>

- Pandemic Questionnaire
- Debt Schedule
- Monthly Projections Template
- 4506C Form
- Personal Financial Statement

<b>Business Tax Returns:</b> Provide full federal tax returns for the past <u>three</u> years.*	Applicant	
<b>Financial Statements:</b> Business balance sheet and income statement ( <u>within 60 days</u> ).	Applicant	
<b>Business Bank Statements:</b> October, November, and December 2019 statements.	Applicant	
<b>Business Debt Schedule:</b> Fill out debt schedule with <u>all</u> business debts.	Template	
<b>Projections:</b> Please provide twelve months of financial projections for the business.	Template	
<b>Pandemic Questionnaire:</b> Fill out questionnaire regarding pandemic outlook.	Template	
<b>Personal Tax Returns:</b> Provide full federal tax returns for the past <u>three</u> years.**	Applicant	
<b>Personal Financial Statement:</b> Provide for all owners 20% or greater and guarantors.	Template	
<b>Driver's License or Government Photo ID:</b> Provide for all owners 20% or greater.	Applicant	
<b>Void Business Check:</b> Provide for bank account to be used for loan disbursement.	Applicant	
<b>IRS Form 4506-C:</b> Please sign the bottom of attached form. Pursuit will fill out top part.	Template	

\*If 2020 business tax returns are on extension, in the alternative provide company prepared financial statements (balance sheet and income statement). Please provide a copy of the extension filing.

\*\*If 2020 personal tax returns are on extension, please provide a copy of the extension filing.