



Document Checklist

DEBT RESTRUCTURE OR WORKING CAPITAL

The underwriting process cannot begin until all of the documents listed below have been submitted to Succession Lending. Once all documents are received, 45 days to close.

1. Required to Initiate Underwriting

- Succession Lending Loan Application**
- Succession Lending Loan Questionnaire**
- Personal Tax Returns** for previous three years completed
- Business Tax Returns** for previous three years completed
- Profit and Loss** for most recent year
- Projected Financials** for most recent year not completed (2017)
- Personal Financial Statement** — required for all guarantors
- Investment Portfolio** representative of average client or model portfolio
- Trailing Twelve Month Revenue Report** (broken down by product type)
- Valuation** (if one has been completed)
- Outside Business Activity** - Previous three years tax returns

For general inquiries,
please contact your
Regional Director.

Please email all documents to martin.weber@successionlending.com.

Our Underwriting Team is the only department with access to your documents on our secure server. Your Regional Director will not have access.