

Small Business Funding Readiness Checklist

Business Structure Documents

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|---|--|
| <input type="checkbox"/> Employer identification Number (EIN) confirmation letter | <input type="checkbox"/> Financial statements |
| <input type="checkbox"/> Articles of incorporation or organization | <input type="checkbox"/> Profit and loss statement (last 2 years) |
| <input type="checkbox"/> Operating agreement or partnership agreement | <input type="checkbox"/> Balance sheet (last 2 years) |
| | <input type="checkbox"/> Business bank statements (last 6–12 months) |

Grant or Loan Specifics

- ☐ Use of funds statement
- ☐ Business plan or executive summary
- ☐ Application deadline and requirements checklist

Compliance Documents

- ☐ Personal & business tax returns (last 3–4 years)
- ☐ Proof of insurance (e.g. general liability, workers, comp)
- ☐ Business licenses and applicable permits

Application Tracker

Date Submitted	Funding Agency	Contact/Notes	Status