



SF Fire Credit Union

**SMALL BUSINESS ADMINISTRATION (SBA)  
BUSINESS EXPRESS LOAN  
PRELIMINARY INFORMATION REQUEST**

**NAME:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, County, State, Zip

**PHONE:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**WEBSITE:** \_\_\_\_\_

Please provide the following initial information:

**1. Business Express Loan Application**

☐ Attached – complete and sign. Note that this would require the inclusion of any individual who has an interest of 20% or more in the business.

**2. Small Business Administration (SBA) Form**

☐ SBA Form 1919 – Borrower Information Form. Note that this form is required for any individual who has an interest of 20% or more in the business.

☐ SBA Form 4506-T – Request for Transcript of Tax Return. Note that this form is required for the business tax return and/or personal tax return and from each individual who has an interest of 20% or more in the business.

**3. Verification of Income**

☐ Tax Returns - Most recent tax return on the business, be it a business return or personal 1040 w/Schedule C (please provide a complete copy with all schedules and forms)

☐ Interim Business Financial Statements – Profit & Loss Statement or Income Statement

☐ W-2 Forms

☐ Pay Stubs - for the most recent two pay periods

☐ Other *If yes, please describe:*

**4. Business Debt Schedule**

☐ Attached – complete and sign. List any business loans or lines of credit currently held in the name of the business. If you have no debts in the name of the business, simply state that and sign and date the attached form. Note that you do not need to include any personal loans or lines of credit, as those will appear on the personal credit reports.

Please note that additional information will be required as the loan process moves forward.