



## **City National Bank**

2909 Sherwood Way  
San Angelo, TX 76901  
325-703-2031

### **Commercial Loan Application Checklist**

The amount of documentation and information required for a mortgage can seem overwhelming. You can facilitate the application process by collecting as much of the needed information as you can before your appointment. The checklist that follows is a general guideline to assist you with the loan application. Some of the items listed may not apply to you and your lender will probably request some items that we have not mentioned, but this will get you off to a good start.

- **General Materials:**
  - Loan application
  - Driver's License(s) on all authorized individual guarantors and signers
- **Financial Information (all forms must be signed and dated):**
  - Most recent Financial Statement (personal and business)
  - 2 years tax returns(personal and business (if applicable)
  - Profit and Loss
  - Balance Sheet
- **Real Estate Loans :**
  - Purchase Agreement
  - Rent Rolls (if applicable)
  - Development Plan (budget, specs, plans, etc)

