

New Business Loan Application Checklist

Whether your business is in need of money for working capital or long-term growth, this checklist will ensure you have the proper documents prepared as you look to apply for a loan with Rockland Trust.

Applying for a loan as a new business with limited* or no history:

Completed business plan with two years of financial projections

Resume of experience from each owner

Two years of the most recent personal federal tax returns from each owner

Completed Personal Financial Statement (to be provided by Rockland Trust)

*Limited history is defined as a business with less than two years completed tax returns

If applying for a loan to purchase an established** business, you'll also need:

Two years of the most recent personal federal tax returns from each purchasing owner

Two years of the most recent federal tax returns for the business being purchased

**An established business is defined as a business that has been in operations and completed taxes for more than two years

Other considerations:

When applying for real estate purchase or refinance, Rockland Trust looks for added documentation – contact the Bank to discuss the appropriate documentation for your unique scenario.

Businesses going through the Small Business Association (SBA) for a loan should be aware that an SBA fee may apply, depending on the loan size and type.

Get Started:

Contact your business banking officer or our Customer Information Center at 508.732.7078.



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