

GELT FINANCIAL[®]

C O R P O R A T I O N

2755 Philmont Avenue, Suite 130, Huntingdon Valley, PA 19006
Phone: 215-947-2974 x 275 Fax: 215-947-9101
AriMiller@geltfinancial.com

Small Business Loan application packet

Thank you for inquiring about a small business loan from Gelt Financial. As we go through the loan process together, we will be happy to answer any questions that you may have. The key to quickly getting an answer to your loan request is the thorough review and completion of the forms listed below:

- Application for business loan
- Personal financial statement
- Statement of personal history
- Eligibility questionnaire
- 4506-T Request for transcript of tax return
- Schedule of Collateral Exhibit A

Please also send us the following documents with each page signed & dated in blue ink:

- Last 3 years business & personal tax returns.
- Last 3 years Profit and Loss statements.
- Year to date Profit and Loss statement dated & signed within 90 days of application
- Balance Statement dated & signed within 90 days of application
- Projection of monthly income and expenses for at least 1 year.
- Brief history of your company and a description of the expected benefits it will receive from the loan. .
- Bio or Resume of the education, technical and business background for all people listed under management.
- Copy of Franchise Agreement and Federal Trade Commission Disclosure Report of Franchisor (if applicable)
- Copy of the buy-sell agreement (if applicable)
- Pro-forma balance sheet for the business being purchased as of the date of transfer (if applicable)
- Business Valuation and/or Appraisal (if available)
- Copy of Seller's financial statements for 3 complete fiscal years (if applicable)
- Interim statements not older than 90 days from receipt of application (if applicable)

Any item that requires a signature needs to be **signed and dated in blue ink**. Please return all of the requested forms and documentation to us. This will speed up the approval process and ensure that you receive our most favorable terms. If you have any questions or concerns about how to complete the forms, please call us.

Looking forward to working with you,
Ari Miller