



Business Narrative Form

CONTACT INFORMATION

LOAN OFFICER / TPO CONTACT	ACCOUNT EXECUTIVE	NATIONAL ACCOUNT EXECUTIVE
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LOAN INFORMATION

BORROWER FIRST NAME	BORROWER LAST NAME	CO-BORROWER FIRST NAME	CO-BORROWER LAST NAME
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BANK STATEMENT ANALYSIS

LOAN AMOUNT	NAME OF BUSINESS	DATE BUSINESS STARTED	
WEBSITE	BORROWER % OWNED %	CO-BORROWER % OWNED %	TOTAL % OWNED %

Describe in detail how the business operates and generates income. Provide as much detail as possible.

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INDUSTRY CATEGORY	TYPE OF INVESTOR	INCOME ANALYSIS METHOD	EXPENSE RATIO %
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Payment Methods used by the Business to receive income — check all that apply

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|--|---------------------------------|--------------------------------|--|
| ☐ Check | ☐ Venmo | ☐ Zelle | ☐ CashApp |
| ☐ Wire Transfer | ☐ Cash | ☐ ACH | ☐ Merchant Deposits |
| ☐ PayPal | ☐ Intuit | ☐ Other | <input type="text"/> |

CURRENT BUSINESS STRUCTURE	LEGAL STRUCTURE CHANGE (12/24 MO)
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Reason / changes that have occurred to the business structure

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Bank account(s) and type of statement(s) that will be used for this request

BANK NAME	LAST 4 DIGITS OF ACCOUNT #	STATEMENT TYPE (Business, Personal/Co-Mingled, Personal + 2 Mo. Business)



Additional Notes (if any)

NAME	TITLE	DATE
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SIGNATURE