

CapitalSource Professional Practice/Business Lending

CapitalSource

Professional Practice Lending
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Loan Approval Package Checklist

Financial Documentation Required–Buyer

- Tax returns for each borrower/guarantor for the last three years
- Corporate/business tax returns for each borrower/guarantor (if applicable) for last three years
- Current interim financials on your corporation(s) (if applicable)
- Signed CapitalSource application including personal financial statement and personal budget
- Resume/CV or website with your background information
- Copy of your driver's license
- Copy of any employment contact (if applicable)
- Production/procedure report (if available)

Financial Documentation Required–Seller

- Tax returns for the last three years from the business being sold
- Current YTD interim financial statement and balance sheet for business
- Signed CapitalSource practice/business profile
- Current accounts receivable report
- Production/collection report by provider and procedure for the last two years (if available)
- Practice appraisal (if available)
- Current practice fee schedule (if available)
- Draft of the purchase and sales agreement (if available)

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