

Borrower Name \_\_\_\_\_ Loan Number (if Registered) \_\_\_\_\_  
Business Name \_\_\_\_\_ Business Website \_\_\_\_\_

1. What type of industry category best describes the borrower's business? \_\_\_\_\_ If Other, describe: \_\_\_\_\_
2. How long has the borrower owned the business? \_\_\_\_\_
3. Is the borrower a sole-practitioner? \_\_\_\_\_
4. What percent of the business does the borrower own? \_\_\_\_\_
5. Does the business rent or own physical space (office, plant, storefront)? \_\_\_\_\_
6. How many physical locations does the business have (do not include home office)? \_\_\_\_\_
7. What is the combined number of employees/contractors (excluding the borrower)? \_\_\_\_\_
8. Does the company manufacture a product where there is a cost of goods/materials for the product that is ultimately sold? ☐ Yes | ☐ No
9. Does the company buy / resell a product that requires little or no refinishing? \_\_\_\_\_
10. Does the business require the use of heavy equipment / materials / vehicles? \_\_\_\_\_
11. How does the business get paid? Select all that apply
 

<input type="checkbox"/> Merchant Deposits	<input type="checkbox"/> Branch Deposits
<input type="checkbox"/> Remote Online Deposits	<input type="checkbox"/> Check
<input type="checkbox"/> Cash	<input type="checkbox"/> Venmo
<input type="checkbox"/> PayPal	<input type="checkbox"/> Square
<input type="checkbox"/> Zelle	<input type="checkbox"/> CashApp
<input type="checkbox"/> Other _____	
12. Do you plan on submitting 12 or 24 months of bank statements? ☐ 12 months | ☐ 24 months

Provide a brief description of how the business operates, advertises and generates revenue.

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Completed By: \_\_\_\_\_ Date: \_\_\_\_\_

If have multiple businesses, please fill out this sheet for each business.

Submission Instructions:

We cannot accept PDFs with the same naming convention. When saving this PDF, we recommend 'LastNameBusinessName' such as 'SmithAceHardware'  
Avoid using spaces, or any symbols in the file name. Numbers are fine.

**Questions?**

**Contact your AE or email: [salesupport@keystonefunding.com](mailto:salesupport@keystonefunding.com)**