

SBA Loan Application

You requested **\$40,000**. You are on your way to getting a Small Business Loan!

Contact Info

Business Info

Business Details

Industry

Funding Request

Business Financials

Attestations

Ownership

Review

Contact Info

[Watch Helper Video \(2 min\)](#)

Est. Time to Complete - 5 min

Description about this form section in layman's words, not confusing SBA language.
Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Primary Contact Person

First Name

Last Name

Address

Address Line 2

City

State

Zip Code

Zip Code + 4

Email Address

Phone Number

[Save & Continue](#)

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[Watch Helper Video \(3:30 min\)](#)

Est. Time to Complete - 7 min

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Official Business Name

Trade Name (DBA)

Business Type

Business Management Type

Tax ID

Is there a project address that is different from the business address? Yes No

[Save & Continue](#)

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[Watch Helper Video \(1 min\)](#)

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Is your business any of the following?

- Business type 1
- Business type 2
- Business type 3
- Business type 4

Do you plan to use a 401(K) Plan (including a Rollover for Business Start Up (ROBS) Plan) for equity?

Yes

No

Will a Management Company be hired by the Applicant to manage the day-to-day operations?

Yes

No

[Save & Continue](#)

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Est. Time to Complete - 1 min

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

What industry is your business in"

Start typing your industry...

[Save & Continue](#)

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Watch Helper Video (2 min)

Est. Time to Complete - 4 min

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Amount Requested

\$

40,000

Number of employees you have today

Number of jobs this loan will help you create?

Number of jobs this loan will help you save?

Purpose of Loan

How will you use the funds?

How much of the loan will you use for this?

[Add another purpose](#)

[Save & Continue](#)

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Industry

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Ownership

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Business Financials

Est. Time to Complete - 6 min

Watch Helper Video (2 min)

Description about this form section in layman's words, not confusing SBA language.

Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

What is your estimated **monthly revenue**?

\$ 40,000

What are your estimated **monthly expenses**?

\$ 40,000

What is your estimated **total debt**?

\$ 40,000

Save & Continue

SBA Loan Application

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Business Info

Business Details

Industry

Funding Request

Business Financials

Attestations

Ownership

Review

Attestations

Est. Time to Complete - 10 min

Watch Helper Video (4 min)

Description about this form section in layman's words, not confusing SBA language.

Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Here goes an eligibility question.

Yes No

Save & Continue

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Ownership

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Est. Time to Complete - 4 min

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Who are the owners?

Owner's Name

What percent of the company do they own?

 %

Owner's Contact's Email

Is this owner an individual or entity?

Individual Entity

[Add another owner](#)

[Save & Continue](#)

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Contact Info [Edit](#)

First Name	Last Name
Emerson	Taymor
Address	Address 2
105 Duane St	52H
City	State
New York	New York
Zipcode	Zip+4
10007	
Email	Phone
emerson@philosophie.is	415-516-8341

Business Info [Edit](#)

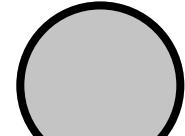
Official Business Name	Trade Name (DBA)
Philosophie Group Inc	Philosophie
Business Type	Business Management Type
C-Corp	
Tax-ID	
55-1234567	

[Submit Application](#)

Your Loan Application has been submitted

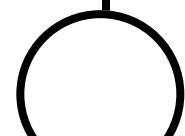
Our team is reviewing it. We will be in touch with you in the next few days to collect more information.

Application



You've submitted the initial application! Great work. Our team now reviews it to make sure it is a good fit for the SBA. If not, we may be able to suggest other loan options.

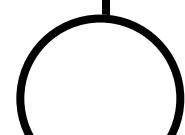
3-5 days



Onboarding Documents

If pre-approved, the SBA requires a number of documents around ownership and business financials. It typically takes people up to a week to gather and upload this information. You and your fellow owners will receive when ready to fill this out.

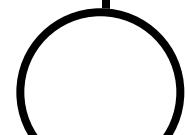
< 7 days



KYC / Additional Materials

We review this information and may require further Know Your Customer (KYC) checks. We'll notify you if we need more info.

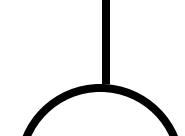
2 days



Signature

If everything looks good, we will send you a packet for signature, which automatically gets sent to the SBA. The SBA usually responds to us within 5 days.

5 days



Account Funded

Assuming no hang ups your account will be funded within 48 hours of SBA approval.

2 days

Other Resources

SBA Loan Application

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Ownership Information

We are working with Philosophie Group Inc. to secure an SBA loan. Since you are listed as an owner, we need to collect more information about you.

Contact Info

Personal Info

Eligibility

Contact Info

[Watch Helper Video \(2 min\)](#)*Est. Time to Complete - 5 min*

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

First Name

Last Name

Address

Address Line 2

City

State

Zip Code

Zip Code + 4

Email Address

Phone Number

[Continue](#)

Ownership Information

We are working with Philosophie Group Inc. to secure an SBA loan. Since you are listed as an owner, we need to collect more information about you.

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Personal Info

Eligibility

Personal Info

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Ownership Info

Tax ID (SSN/EIN)

Title

Ownership Amount

20 %

Is this portion of the business owned by employees?

 ESOP 401k COOP

Citizenship Info

Date of Birth

City you were born in

State you were born in

Country you were born in

Are you a United States Citizen? Yes No [If No, display LPR, and USCIS Registration and Citizenship details](#)

Demographics

Demographic data is collected for program reporting purposes only. Disclosure is voluntary and has no bearing on the credit decision.

Are you a Veteran or spouse of a Veteran?

What gender do you identify as?

What ethnicity do you identify as? (select all that apply)

- Choice 1
- Choice 2
- Choice 3
- Choice 4

Are you Hispanic/Latino?

[Continue](#)

Ownership Information

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Contact Info

Personal Info

Eligibility

Eligibility

[Watch Helper Video \(4 min\)](#)

Est. Time to Complete - 10 min

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Are you currently under indictment or subject to any criminal charges in any location?

 Yes No

Have you been arrested in the last 6 months for any criminal offense?

 Yes No

Please provide details, including dates, location, fines, sentences, level of charge (whether misdemeanor or felony), dates of parole/probation, unpaid fines or penalties, name(s) under which charged, and any other pertinent information.

Are you presently suspended, debarred, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency?

 Yes No

Are you more than 60 days delinquent on any obligation to pay child support arising under an administrative order, court order, repayment agreement between the holder and a custodial parent, or repayment agreement between the holder and a state agency providing child support enforcement services.

 Yes No

Do you have any ownership in other businesses which are an Affiliate of the Applicant?

 Yes No

Have you, or any business you controlled, ever filed for bankruptcy protection?

 Yes No

Are you, or any business you control, presently involved in any legal action (including divorce)?

 Yes No

Have you or any business owned or controlled by you ever obtained a direct or guaranteed loan from SBA or any other Federal agency or been a guarantor on such a loan? (This includes, but is not limited to USDA, FHA, EDA, and student loans.)

 Yes No

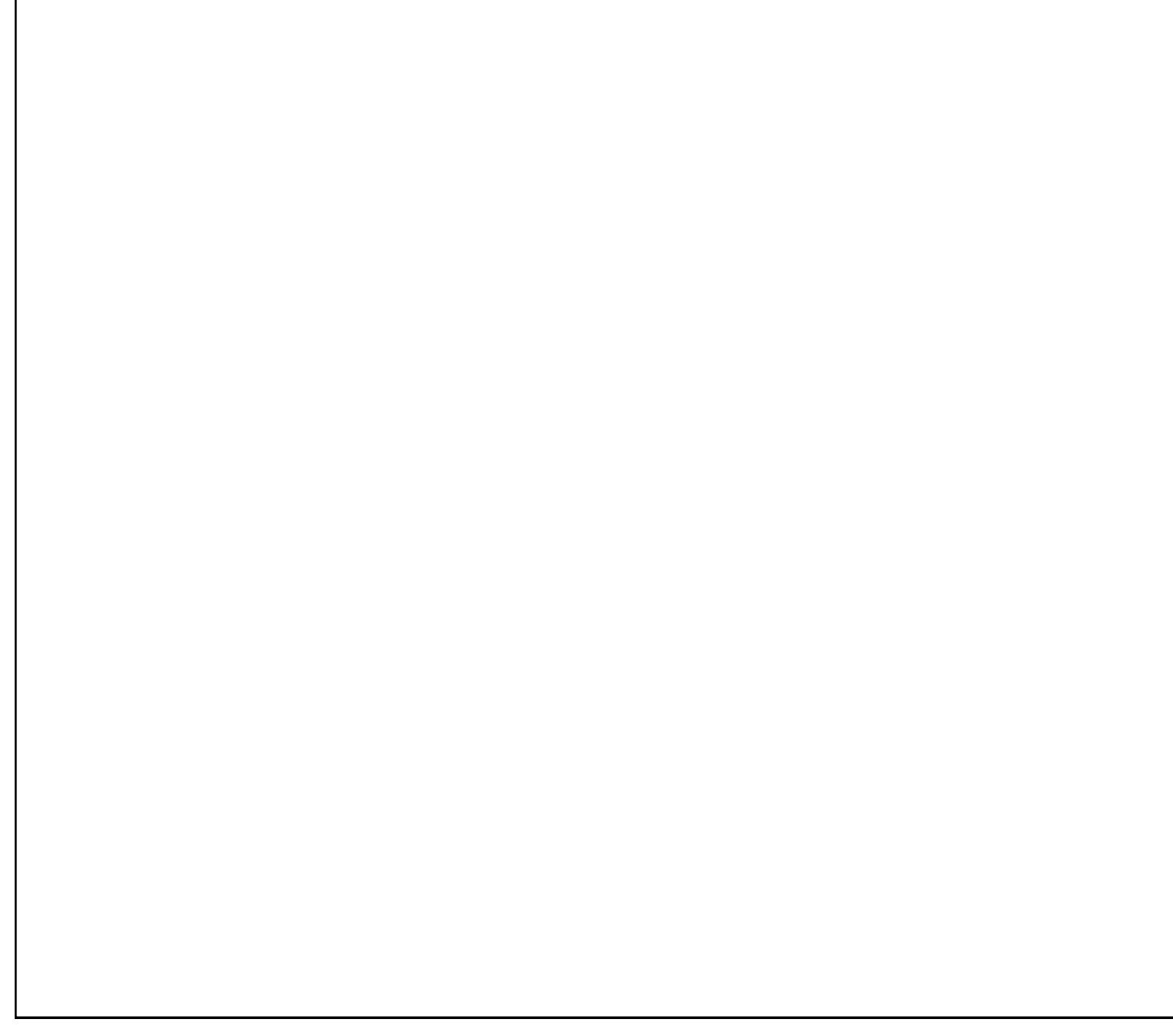
Assuming we will do initials at the signature stage? do owners need to sign application or just applicant

[Submit for Review](#)

Ownership Information

We are working with Philosophie Group Inc. to secure an SBA loan. Since you are listed as an owner, we need to collect more information about you.

Thank you for submitting
your ownership information!



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Contact Info

Ownership Info

Eligibility

Contact Info

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Corporate Info

Owner Legal Name

Tax ID #

Primary Contact Person

First Name

Last Name

Address

Address Line 2

City

State

Zip Code

Zip Code + 4

Email Address

Phone Number

[Continue](#)

Ownership Information

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Contact Info

Ownership Info

Eligibility

Ownership Info

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Identify in what capacity you are Completing this Section? Check all that apply.

401(k) Plan ESOP Plan Other (Explain in separate attachment)

Entity Ownership

List all proprietors, partners, officers, directors, members, Trustees, and holders of outstanding stock in the entity owner. 100% of ownership must be disclosed.

Owner's Legal Name	Title	Ownership Amount	
<input type="text"/>	<input type="text"/>	<input type="text"/> 20 %	
Owner's SSN/EIN	Is this an ESOP	Is this a 401(k) Plan	Is this a Co-Op
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	Address Line 2		
<input type="text"/>	<input type="text"/>		
City	State		
<input type="text"/>	<input type="text"/>		
Zip Code	Zip Code + 4		
<input type="text"/>	<input type="text"/>		

[Add another owner](#)

[Continue](#)

Ownership Information

We are working with Philosophie Group Inc. to secure an SBA loan. Since you are listed as an owner, we need to collect more information about you.

Contact Info

Personal Info

Eligibility

Eligibility

[Watch Helper Video \(4 min\)](#)

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Donec ut est nunc. Morbi eget dapibus lacus, tempus dapibus mauris. Sed hendrerit elit eu purus vulputate, laoreet vulputate tellus ornare.

Is the Entity, or any of its owners, presently suspended, debarred, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency?

Yes No

Does the entity have any Affiliates?

Yes No

Please list all affiliates

Has the entity and/or its Affiliates ever filed for bankruptcy protection?

Yes No

Is the entity and/or its Affiliates presently involved in any pending legal action?

Yes No

Has the Entity ever obtained a direct or guaranteed loan from SBA or any other Federal agency or been a guarantor on such a loan? (This includes, but is not limited to USDA, FHA, EDA, and student loans.)

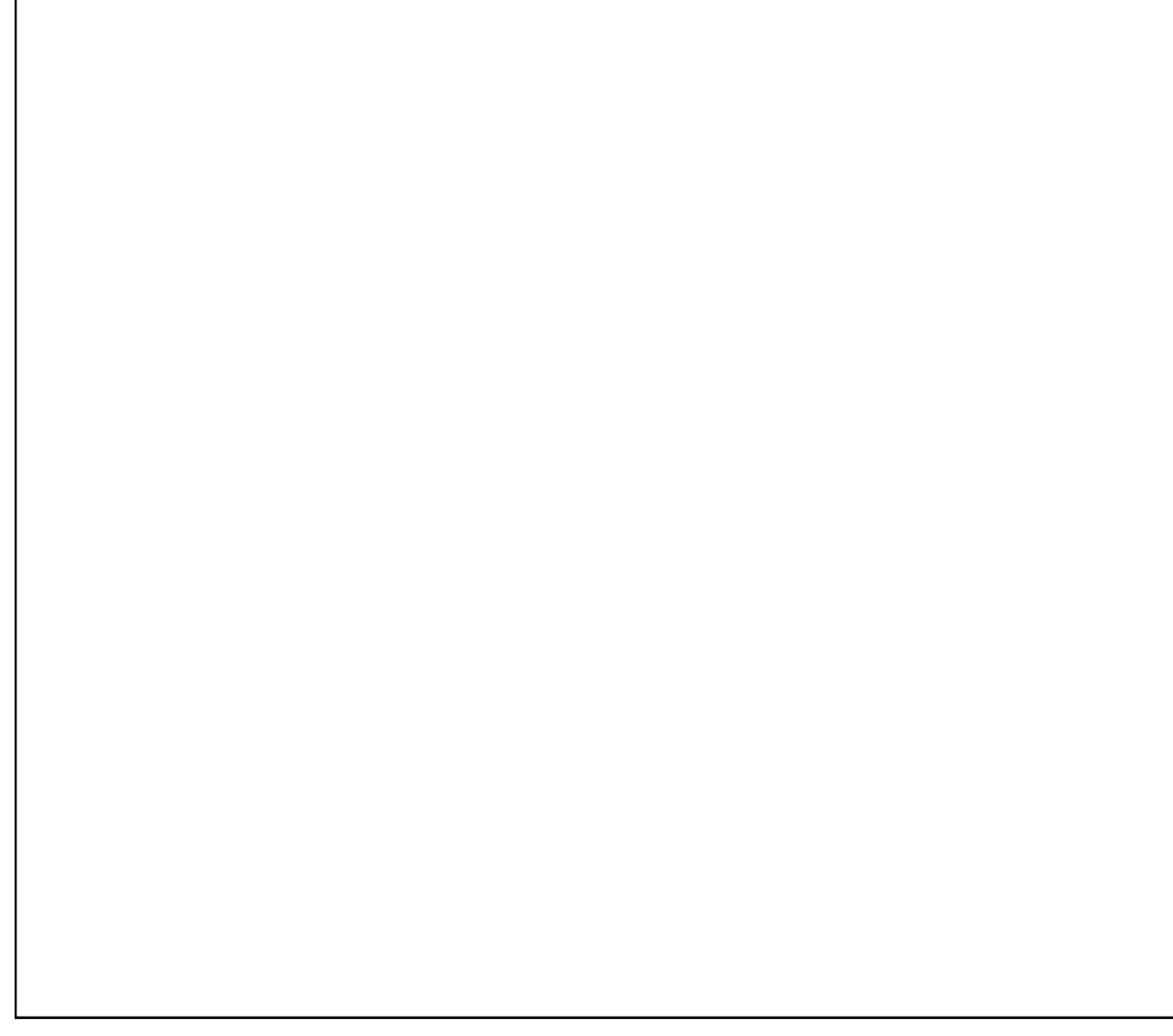
Yes No

[Submit for Review](#)

Ownership Information

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Available Applications

[Add New](#)

Business Name | \$Amount

Business Name | \$Amount

Each item should link to the record on whatever step they are on

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Loan Documentation

You requested **\$40,000**. You are on your way to getting a Small Business Loan! We just need a bit more information.



We still need your ownership information

[Fill Out Now](#)

Documents Needed

2/12

[Watch Helper Video \(2 min\)](#)

- Year-end Profit and Loss (P&L) for last 3 years [Upload Document](#)
- Year-end Balance Sheet for last 3 years [Upload Document](#)
- Reconciliation of Net Worth [Edit](#)
- Interim Balance Sheet [Edit](#)
- Interim Profit & Loss Statements [Upload Document](#)
- Projected Financial Statements [Upload Document](#)

Ownership Response

Emerson J. Smith	
Martin B Michael	
Scott D Charley	
Steve F Mantra	
Bryan F Diamond	
Jordan S Kantor	

Loan Documentation

You requested **\$40,000**. You are on your way to getting a Small Business Loan! We just need a bit more information.



We still need your ownership information

[Fill Out Now](#)

Documents

4/16

12
needed

2
in review

2
approved

Business Financials

2/10

Year-end Profit and Loss (P&L) for last 3 years	Upload
Year-end Balance Sheet for last 3 years	Upload
(Reconciliation of Net Worth <i>Networthfile.doc</i>)	Remove
(Interim Balance Sheet <i>BalanceSheet.doc</i>)	Remove
Interim Profit & Loss Statements	Upload
Projected Financial Statements	Upload

need to get this on tracker page somewhere

Ownership Responses

4/6

Emerson J. Smith	(
Martin B Michael	(
Scott D Charley	
Steve F Mantra	(
Bryan F Diamond	(
Jordan S Kantor	

should we include dates emailed?

ANKUR START HERE

Loan Documentation

You requested **\$40,000**. You are on your way to getting a Small Business Loan! We just need a bit more information.



We still need your ownership information

[Fill Out Now](#)

Documents

4/16

12
needed

2
in review

2
approved

Business Financials

2/10

Year-end Profit and Loss (P&L) for last 3 years

[Upload](#)

Year-end Balance Sheet for last 3 years

[Upload](#)

Reconciliation of Net Worth

Networthfile.doc

[Remove](#)

Interim Balance Sheet

BalanceSheet.doc

[Remove](#)

Interim Profit & Loss Statements

[Upload](#)

Projected Financial Statements

[Upload](#)

Business License

Small business owners will need to be able to provide the original business license or certificate of doing business when closing the loan.

[Upload](#)

Loan Application History

Include records of any loans the small business owner may have applied for in the past.

[Upload](#)

Income Tax Returns

0/3

Include the business' signed federal income tax returns for the previous three years.

[Upload](#)

Business Overview & History

Provide a history of the business and its challenges. Include an explanation of why the SBA loan is needed and how it will help the business.

[Upload](#)

Business Lease

Include a copy of the business lease, or note for a landlord, giving terms of the proposed lease.

[Upload](#)

Note: we will need to figure out if purchasing existing businesses are in scope since there are additional documents needed for that case

Nav

Nav

My Loans - 25

Name	Business	Request	Employees	Status	Length	App #
------	----------	---------	-----------	--------	--------	-------

Nav

Nav

Loan for Leo Harris

Status

[Actions](#)

Name Business Request App #

Flags

[App Started](#)[App Submitted](#)[Ownership](#)[Docs](#)[KYC](#)[Details](#)[Docs](#)[Cases](#)[Owners?](#)

Applicant

Business

Owners?

Attestations

Owners?

Activity

Document apprvoved

Document rejected - note to customer

Document uplpaed

App Submitted

Nav

Nav

Loan for Leo Harris

Status

[Actions](#)

Name Business Request App #

Flags

[App Started](#)[App Submitted](#)[Ownership](#)[Docs](#)[KYC](#)

Details

Docs

Cases Owners?

Still Needed -4

Needs Review - 2

Doc Name Doc Date

Review

Doc Name Doc Date

Review

Approved - 5

Rejected

Activity

Document approved

Document rejected - note to customer

Document uploaded

App Submitted

Nav

Nav

Automated reminder email - 7 days after app started if not finished
List - any applications not completed after 14 days for opportunity to follow up and document with case

Stalled Applications - 10

Name	Business	Request	Employees	Status	Length	App #
------	----------	---------	-----------	--------	--------	-------
