

# Fast Track Assessment (FTA) Request

Please fill out the form below and provide all documentation by emailing [FTA@prudentlenders.com](mailto:FTA@prudentlenders.com).

|                          |  |  |
|--------------------------|--|--|
| <b>Business Name:</b>    |  |  |
| <b>Business Address:</b> |  |  |
| <b>Business Owners:</b>  |  |  |
|                          |  |  |
|                          |  |  |
|                          |  |  |

## Proposed Use of Loan Proceeds and Loan Terms

| Project Cost Summary:      |  | Notes |
|----------------------------|--|-------|
| Commercial Real Estate     |  |       |
| Renovations / Improvements |  |       |
| Purchase Equipment         |  |       |
| Purchase Inventory         |  |       |
| Working Capital            |  |       |
| Business Acquisition       |  |       |
| Debt Refinance             |  |       |
| Other                      |  |       |
| <b>Total:</b>              |  |       |

|                                  |  |                               |  |
|----------------------------------|--|-------------------------------|--|
| <b>Equity Contribution:</b>      |  | <b>Source of Equity:</b>      |  |
| <b>Proposed Interest Rate:</b>   |  | <b>Fixed / Variable:</b>      |  |
| <b>Proposed Loan Term:</b>       |  | <b>Lender Packaging Fee:</b>  |  |
| <b>Broker / Referral Source?</b> |  | <b>Broker / Referral Fee?</b> |  |

## Brief Transaction Summary

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## Required Documents

| Business Information   | Personal Information   |
|--|--|
| Business Tax Returns (three years)<br>Current Balance Sheet and Income Statement (60 days)<br>Business Debt Schedule<br>Projections for Two Years (Startup or Expansion) | Personal Tax Returns (three years)<br>Personal Financial Statement<br>Personal Credit Report or Authorization<br>Owner Questionnaire |