

- **What is this document?**

This is an example business loan application that will help you understand and prepare the information you will need to apply for your own business finance loan.

- **How do I use this document?**

Fill in all the necessary fields and gather any suggested supporting documents that relate to these fields.

- **Essential instructions and considerations**

When you fill in your actual business loan application, your lender may require additional information to what we have included in this template. Remember to check the requirements of your specific loan when applying.

## Business Loan Application

Date:

Lender name:

Lender contact details:

### Essential business information:

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Company legal name:

Tax ID:

Address:

Telephone:

Email:

Business type (*e.g. sole trader, LC, LLP, Ordinary Partnership, Corporation*):

Date established:

Industry / sector:

Annual sales revenue:

## Business account: *(Add additional information for multiple accounts if necessary)*

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Name of bank:

Address:

Account Number:

Monthly average balance:

## Director information:

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Director name (1): *(Add additional directors if necessary)*

Address:

Telephone:

Email:

National Insurance Number:

## Ownership distribution: *(shareholder, partners, directors)*

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Individual 1:

Number of years:

Percentage of business ownership:

Individual 2:

Number of years:

Percentage of business ownership:

## Existing credit relationships:

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Loan provider:

Existing loan amount:

Maturity:

Purpose of loan: (e.g. purchase of business, purchase of equipment or stock, working capital, refinancing existing debt, purchase business property etc.)

Presently owing:

Repayment terms:

## New loan request:

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Type of loan requested:

Amount requested:

Requested loan term:

Purpose of loan:

## Assets

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Business Assets	Amount / Type	Personal Assets	Amount / Type
Cash		Cash	
Property		Property	
Equipment		Equipment	
Investments		Investments	
<b>Total assets:</b>		<b>Total assets:</b>	

## Collateral (optional)

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Do you intend to use collateral to secure your loan?

If so, please state: *(e.g. business assets, shares, property etc.)*

## Guarantor information (optional)

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Do you intend to use a guarantor to secure your loan?

If so, please provide their details: *(Note: guarantors will typically be required to complete their own application to accompany your own)*

## Business background information

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Please provide a summary of the business, as well as its future plans for development and growth. Any product or customer base information is also relevant here:

*(Note: Refer to Know Your Money's business loan application cover letter template for more information on what background information is required.)*

## Director business experience

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Please provide a summary of each director's business experience over the last five years, including their background in management, trading or other relevant business activities, within the company or previously.

*(Note: This information can also be included in the business loan application cover letter.)*

## Additional information: (Common questions asked by loan providers)

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Have you or any business you were an owner of ever declared bankruptcy?

Are you or your business involved in any legal actions?

Are you or your business in arrears or in dispute over any tax related issues?

Do you or your business own or lease the business property?

Do you or the business have any other liabilities? (e.g. Mortgage, credit card balances etc.)

**Documents checklist** *(Documents that either support the above information or will be requested as additional supporting information to inform your lender's loan decision)*

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- Form of valid ID
- CV of directors
- CV of senior members of staff
- Business plan
- Legal certifications / business license
- Proof of ownership
- Customer / client list
- Bank statements
- Balance sheet
- Profit and loss statements
- Tax returns
- Personal credit score (gathered through online providers)
- Business credit score (gathered through online providers)
- Property lease / ownership documents

## **Final tip**

Not every lender will require the same information or will ask you the same questions.

To make sure you have the best chance of success during your application process, be prepared to provide any of the information lenders might require – including any documentation required as proof.