

**BUSINESS SUMMARY SHEET**  
**FOR SBA LOAN APPLICATION**

**I. Business Description:**

a. Name and description of business:

b. Legal structure (sole proprietorship, partnership, corporation, etc). Principals/officers with 20% or more ownership along with title and brief management qualification/experience:

c. Date business was originally established AND date when business was purchased by current owner:

d. Location (neighboring area) description:

e. Business operating days and hours:

f. Number of current employees (full time/part time) AND number of employees to be retained:

g. Please explain any fluctuation in sales and expenses over the last three years and year-to-date:

**II. Product/Service:**

a. Description of available products and services:

b. Customer base including top customers, % of total sales volume and sales terms offered:

c. Name of top three suppliers, % of total purchasing volume and purchasing terms offered:

d. Names and locations of major competitors. Please indicate business' advantage over competitors:

**III. Marketing & Projection (please feel free to attach your own business plan):**

a. Marketing plan or strategy:

b. Future expansion plans:

c. Expected change in sales (% increase/decrease) and reasons:

d. Expected change in cost of goods sold and operating expenses (% increase/decrease) and reasons:

**IV. Other Questions:**

a. Have you had any previous SBA loans or any federal government loans, including student loans? If so, please indicate original loan amount, approval date and the current status:

b. Are you related to the seller of the subject transaction? If so, please provide details:

c. Do you, your spouse or any member of your household work for the SBA, SCORE, ACE, any Federal Agency, or the participating lender?

**d. I understand that United Business Bank charges an SBA packaging for SBA loan packaging services. I hereby acknowledge that I am not required to obtain or pay for SBA loan packaging services offered by United Business Bank. (Initials: \_\_\_\_\_ )**

---

Signature

---

Date