



## Document Checklist

### ACQUISITION, MERGER OR SUCCESSION

Please **DO NOT** submit any documents via email. Upload documents to our secure server via the link received. Our Underwriting Team is the only department with access to your documents on our secure server.

The underwriting process cannot begin until all of the documents listed below have been submitted to SkyView Partners.

#### Required from Buyer/Guarantor:

- SkyView Partners Loan Application
- SkyView Partners Loan Questionnaire
- Personal Tax Returns for previous three years completed
- Business Tax Returns for previous three years completed
- Profit and Loss for most recent year & balance sheet
- Projected Financials for most recent year not completed (2017)
- Personal Financial Statement (must be signed and dated)— required for all guarantors (buyers)
- Investment Portfolio representative of average client or model portfolio
- Trailing Twelve Month Revenue Report broken down by product type
- Valuation (if one has been complete)
- Outside Business Activity — previous three years tax returns
- Credit Authorization (all guarantors)
- Driver's License (required for all applicants) — please scan front and back
- Most Recent Bank Statement — please submit recent month end personal bank statement
- Corporate/Organizational Documentation – Articles of Organization or Incorporation

#### Required from Seller:

- SkyView Partners Loan Questionnaire
- Personal Tax Returns for previous three years completed
- Business Tax Returns for previous three years completed
- Profit and Loss for most recent year & balance sheet
- Trailing Twelve Month Revenue Report broken down by product type
- Valuation (if one has been completed)
- Purchase Agreement
- Seller Non-Compete/Non-Solicit
- Seller Note (if applicable)