Loan Client Checklist - Individual/Married Couple

Discovery
____ Intake survey
____ Initial visit with Akiptan's staff

Technical Assistance and Completion
____ Loan Application
____ Credit and Bank Authorization Form
____ Driver's License
____ Proof of Enrollment
____ 3 years previous Tax Returns (if applicable)
____ Cattle/Horse Brand (if applicable)
____ Proof of Insurance (if applicable)
____ Proof of Leases (if applicable)
____ Labor Trade Agreement (if applicable)
____ Detailed Loan Narrative and Loan Funds Budget
____ Financial Literacy Coursework
____ CreditKarma.com Account
____ Current Balance Sheet
____ 3 years Cash Flow Projections
____ Cattle Growth Chart (if applicable)

Review and Closing
____ Detailed Record of Collateral is Sent to Loan Staff
____ Loan Agreement is Signed
____ Security Agreement is Signed
____ Privacy Statement is Received
____ Note of Credit Reporting is Received

Aftercare
____ Receipts/Invoices/Quotes/Titles are Submitted
____ Proof of Insurance (if applicable)
____ Quarterly Check-Ins
____ Annual Financial Reviews
____ Yearly taxes