

Equipment lender document checklist

Use this checklist for the actual service, product, site and jurisdiction. Leave missing evidence unresolved until the responsible person confirms it. Record the decision and its source before proceeding.

Business job date and responsible person

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- ☐ Request the actual lender document list and application terms.
 - ☐ Prepare business identity, ownership, registration and tax identification.
 - ☐ Provide the equipment quote and intended use of funds.
 - ☐ Gather requested financial statements, bank records and tax documents.
 - ☐ Prepare actual debt obligations, forecasts and seasonal cash assumptions.
 - ☐ Provide collateral, insurance and guarantee information only as requested.
 - ☐ Check secure submission instructions and document versions.
 - ☐ Retain the final written offer and unresolved questions before signing.

Unresolved items evidence and next action

Decision owner and follow up date

Sources and record notes

Author NPMCA. Worksheet version 1.0; guide record as of 2026-10-11. Technical limits and prices must come from the exact current product instructions, official rule or dated written quote.

SBA Lender Match: <https://www.sba.gov/funding-programs/loans/lender-match-connects-you-lenders>

Guide: <https://www.npmca.org/start/equipment-financing>