PacketHQ

SAMPLE CHECKLIST

Business loan file

Banking & lending teams

Practice with this file in the sample portal. Use fictional documents only.

- [ ] **Financial statements**

  Gather the sample balance sheet and income statement for the period requested.

- [ ] **Debt schedule**

  List the example obligations and their payment schedules.

- [ ] **Supporting statements**

  Include the statement pages referenced by the sample application.