



Checklist For Full Package Submissions

\$30,000 - \$150,000 Total Exposure*

- 1 Write-up/Proposal – Explain the deal details
- 2 Completed Credit Application & Authorization
- 3 CBR**
- 4 Equipment Pricing/Invoice & Specs
- 5 3 months' most recent Business Bank Statements
+ Any additional reserve account statements***
- 6 2 years' most recent Federal Tax Returns or
1 year most recent Federal Tax Return
+ Most recent year P&L and Balance Sheet

\$150,000 - \$250,000 Total Exposure*

All of the above + the following:

- 7 Year-to-Date P&L and Balance Sheet
- 8 PG's most recent Personal Federal Tax Return

\$250,000 - \$3,000,000 Total Exposure*

All of the above + the following:

- 9 PG's Personal Financial Statement
- 10 Last 2 years Business Financial Statements
- 11 Debt Schedule/List of current Leases & Loans
- 12 Client List broken down by % of client business
- 13 Any additional information you believe will help
with our understanding of the customer, equipment,
or transaction

Submission Notes

* Total Exposure equals the current request amount + any outstanding amounts on current Quality contracts.

** If you pull credit, please provide, however we will soft pull two CBRs in-house for underwriting, Quality will only hard-pull CBRs before funding.

*** All submitted bank statements, tax returns, and financial statements should contain ALL PAGES.