



CPA RELATIONSHIP FORM

Please complete this form in its entirety prior to uploading it into the portal.

BUSINESS CONTACT DETAILS	
Borrower Name:	Borrower Business Name:
Business Address (street, city, state, ZIP):	
Business Phone Number:	Business Email Address:
Business Website:	

CPA or licensed Tax Preparer to complete the following section.

RELATIONSHIP DETAILS	
Borrower Position / Title	Borrower Ownership Percentage (%)
Business Formation Date	How long has Borrower owned the business?
Is business active, solvent, and in good standing?	
Type of Business / Business Line of Work	
Has the business operated at a loss in past 12 months? <i>*Measured from date of this form*</i>	
Would withdrawals from business account(s) have an adverse impact on the business? <i>*Required if borrower intends to use business funds for loan down payment and/or closing costs*</i>	
Additional Comments (if applicable)	

PREPARER INFORMATION	
Preparer Name	
Preparer Title	
Preparer Business Name	
Preparer Business Address (street, city, state, ZIP)	
Preparer Phone Number	
Preparer Email Address	
Preparer PTIN	
Preparer CPA License / Certification Number	
Documentation used to prepare P&L? (if applicable)	

Preparer Signature	Date
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