



ENTITY CHECKLIST

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

LOAN DETAILS	
Borrower Name:	Loan Number:
Subject Property Address (street, city, state, ZIP):	

ENTITY DETAILS			
Entity Name:		Entity Tax Identification Number (EIN):	
ENTITY TYPE <i>*Select all that apply*</i>			
<u>Limited Liability Company (LLC)</u> ☐ Articles of Organization / Certificate of Formation ☐ Tax Identification Number (EIN) ☐ Certificate of Good Standing within 90 days of closing ☐ Entity Operating Agreement that specifies authorization for the person(s) executing all docs on behalf of the entity			
<u>Limited Partnership/General Partnership</u> ☐ Certificate of Formation, Articles of Organization, Partnership Certificate ☐ Partnership Agreement and all amendments ☐ Tax ID# ☐ Certificate of Good Standing within 90 days of the note date ☐ Entity Operating Agreement that specifies authorization for the person(s) executing all docs on behalf of the entity			
<u>Corporation</u> ☐ Filed Certificate/Articles of Incorporation (and all amendments) ☐ By-Laws (and all amendments) ☐ Tax Identification Number (EIN) ☐ Certificate of Good Standing within 90 days of the note date ☐ Borrower/Corporate Resolution granting authority of signer to enter a loan obligation ☐ Receipt of current year franchise tax payment or clear search			
ENTITY PARTICIPANTS			
Name	Ownership %	Guarantor	Select
Name	Ownership %	Guarantor	Select
Name	Ownership %	Guarantor	Select
Name	Ownership %	Guarantor	Select
Total Entity ownership represented?			