Levr.ai Business Loan Document Checklist

Everything lenders typically ask for, in one list. Gather these before you apply and your application moves in days, not weeks.

Core documents (almost every lender)

☐	Bank statements	Most recent 3 to 6 months, official PDFs from your banking portal, not screenshots.
☐	Year-end financial statements	Income statement and balance sheet for the last fiscal year, plus interim if available.
☐	Business tax returns	Last 1 to 2 years. Canada: T2 plus Notices of Assessment. US: 1120, 1065, or Schedule C.
☐	Proof of business registration	Articles of incorporation, business license, or registration certificate.
☐	Government-issued ID	For every owner with 20%+ ownership, in most cases.
☐	Void cheque or banking details	For funding deposit and payment setup.

Product-specific additions

☐	Card processing statements	For merchant cash advances: 3 to 6 months of processor statements.
☐	A/R aging report	For invoice and receivables financing: who owes you, how much, how old.
☐	Equipment quote or invoice	For equipment financing: the vendor quote for what you are buying.
☐	Business plan and projections	For SBA-style, startup, and larger term loans.
☐	SR&ED; claim filings	For SR&ED; financing: your filed or in-progress claim documents.
☐	Existing debt schedule	For larger facilities: current loans, balances, payments, and lenders.

Three tips from the lending desk: use bank-generated PDFs, never screenshots. Make sure revenue matches across your application, statements, and returns, since mismatches stall deals. And disclose anything a lender will find anyway, because surprises read worse than problems.

Upload these once at **levr.ai** and apply to 50+ lenders with one application. More guides: levr.ai/resource-center