



## 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? <input type="text"/>                                                                                                                      |                                           |
| 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>                                                                                              | <input type="text"/>                      |
| Would withdrawals from business account(s) have an adverse impact on the business?<br><i>*Required if borrower intends to use business funds for loan down payment and/or closing costs*</i> | <input type="text"/>                      |
| Additional Comments (if applicable)                                                                                                                                                          |                                           |

| PREPARER INFORMATION                                    |                      |
|---------------------------------------------------------|----------------------|
| Preparer Name                                           |                      |
| Preparer Title                                          | <input type="text"/> |
| Preparer Business Name                                  |                      |
| Preparer Business Address<br>(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<br>Signature | Date |
|-----------------------|------|