



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 <i>(street, city, state, ZIP)</i>	
Preparer Phone Number	
Preparer Email Address	
Preparer PTIN	
Preparer CPA License / Certification Number	
Length of business relationship with Borrower?	
Did preparer file Borrower's latest tax return?	
Documentation used to prepare P&L?	

Preparer Signature	Date
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