

Financing Partner Checklist



Understanding Your Business

1. Does the lender have other customers that operate in your industry? Yes No
2. How long has the lender been serving your industry? _____

Services Provided

Does this lender provide the following financial products?

- New equipment loans Yes No
- New equipment leases Yes No
- Used equipment loans Yes No
- Used equipment leases Yes No
- Refinancing Yes No
- Debt consolidation Yes No
- Working capital loans Yes No
- Accounts receivable financing Yes No

Equipment Knowledge

1. Does the lender often finance the type of equipment you are purchasing? Yes No
2. Does the lender finance new and used equipment? Yes No

Relationship Building

1. Does the lender have a local industry-dedicated representative that will come to your facility to meet with you? Yes No
2. Do you need to go to the lender to sign papers? Yes No
3. Is there a representative that will answer your telephone call? Yes No