

Self-Employed Business Narrative Form

This form to be completed by an employee (non-relative) of the borrower's business, with knowledge and information of the operations and finances of the business. Typical positions held by this employee would include: Controller, Treasurer, V.P. Finance, Finance Manager, Accounting Manager or Human Resources Manager. This form can also be completed by a third-party individual with direct knowledge of the borrower's business, such as Certified Public Accountant or an IRS Enrolled Agent.

1. Using the North American Industry Classification System (NAICS) below, please check the industry that best describes this business:

- | | |
|---|--|
| <input type="checkbox"/> Retail Trade | <input type="checkbox"/> Mining-Quarrying-Oil & Gas Extraction |
| <input type="checkbox"/> Wholesale Trade | <input type="checkbox"/> Finance and Insurance |
| <input type="checkbox"/> Accommodation-Food Service | <input type="checkbox"/> Administrative-Support-Waste Management |
| <input type="checkbox"/> Agriculture-Forestry-Fishing-Hunting | <input type="checkbox"/> Information |
| <input type="checkbox"/> Construction (Home & Remodeling) | <input type="checkbox"/> Real Estate-Rental and Leasing |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Arts-Entertainment-Recreation |
| <input type="checkbox"/> Transportation-Warehousing | <input type="checkbox"/> Professional-Scientific-Technical Service |
| <input type="checkbox"/> Utilities | <input type="checkbox"/> Health Care-Social Assistance |
| <input type="checkbox"/> Educational Services | <input type="checkbox"/> Other Services |

2. Name of business: _____

3. Number of owners: _____

4. Service or Product provided: _____

5. Date business started: _____

6. Business legal structure: ☐ Partnership ☐ Corporation
☐ Sub-S Corporation ☐ Limited Liability Company

7. Business location: (insert address of primary location)

a. Is the space a? ☐ residence ☐ commercial/warehouse

8. Number of business locations: ☐ one ☐ 2-5 ☐ greater than 5

9. Are these locations? ☐ owned ☐ leased

10. Number of employees: ☐ 0-5 ☐ 6-10 ☐ 11-25 ☐ greater than 25

11. Describe any machinery or equipment required for business operations:

12. Does the business require inventory (raw material or finished goods) to generate sales?

☐ Yes ☐ No

a. If yes, describe the inventory and turnover ratio:

Name

Email

Title

Phone Number

Signature

Date