



Prep for Success

Let's talk business loans



What to Bring to the Conversation

Bringing a few key details with you to our first conversation will help us better understand where you are and where you want to go, so we can offer the right support from the start.

- **Your goals** - What do you want to achieve and how would additional funds help you?
- **Basic financial statements** - Tax returns (2-3 yrs), balance sheet, profit & loss or projections.
- **Business plan or summary** - Don't worry, it does not have to be fancy.
- **Ownership details** - Names and ownership percentages of all business owners.
- **Current debt information** - A list of current loans or obligations, debt schedule
- **Your questions** - Bring them all, that's what we are here for.

Local Decisions. Reliable Support. Relationships You Can Count On.

We aim to build meaningful relationships that extend beyond the paperwork. We invest in the growth and success of people. That means we are genuinely interested in fully understanding your business, so we can help you tap into our full range of available tools and connections to support your success. We are here to help — not just with loans, but with insight, guidance and a partnership you can depend on. **Ready to start a conversation?** Let's talk.



10727 E 71st St Tulsa, OK 74164



918.664.6100



info@sbtulsa.bank

