

Fee Disclosure for Agent Services

(Please complete one form for each agent utilized in connection with this application.)

“Agent” includes a lender, loan packager, referral agent, accountant, attorney, consultant or any other party that receives compensation from representing an applicant for an SBA loan.

Agents receiving compensation from applicant for providing services in connection with obtaining this SBA loan.

Type of Agent:

_____ Independent loan packager

_____ Referral agent employed by applicant- (such as a business broker)

_____ Other (describe) _____

Type of Services Agent Providing to Applicant:

_____ Loan packaging

_____ Preparation of business plan

_____ Financial statements specifically for the application

_____ Referral services paid by applicant-(agent enlisted to help secure bank financing)

_____ Other (describe) _____

Total compensation charged to applicant* \$ _____

Agent Name/Address

Name of Agent _____

Business Name of Agent _____

Business Address of Agent _____

* Please note, if total compensation exceeds \$2,500, an invoice must be provided indicating the services performed, the hourly rate and number of hours billed for that service.