SBA microloan contact log

Compare conversations with microloan intermediaries.

DATE / QUOTE DATE

RECORD YOUR FIGURES AND QUESTIONS

Organization and source listing

Service area confirmation

Intended loan use

Quoted terms and fees

Technical assistance discussed

Documents and follow-up dates

QUESTIONS TO RESOLVE

- [ ] Does the intermediary serve the business address?
- [ ] Are applications currently being accepted?
- [ ] What training or support is required or available?

NEXT ACTION / WHO TO CONTACT / FOLLOW-UP DATE

Official background: https://www.sba.gov/funding-programs/loans

fintoku.com/resources/loan-library/

Use current written terms. This worksheet organizes your notes; it does not calculate approval or eligibility.