



[UnitedOne.org/Business-Services](https://www.unitedone.org/Business-Services)

Business Loan Initial Documentation Requirements

Business Loans Made Simple

*What you will need to get your business
loan process started with UnitedOne:*

- EIN paperwork
- Personal financial statement
- Two years of complete tax returns
(Personal + all business entities)
- Article of organization
- Operating agreement
- Business plan
(If new, business plan with projections)
- Business debt schedule
- FinCEN ID
(Info at www.fincen.gov/boi)



Lindsay Wiesner

Business Relationship Manager

email lwiesner@UnitedOne.org

phone 920-652-2572

cell 920-242-8510

NMLS # 2368797

Nellie Weiss

Business Services Manager

email nweiss@UnitedOne.org

phone 920-694-3924

cell 920-323-9418

NMLS # 2065109

Membership eligibility required. Insured by NCUA.

NMLS # 439833

Rev. 1/24