



Capital Access Team (CAT) Check-List for Client Engagement:

For CAT readiness, SBDC clients should complete the following.

Startup Check-list:

- Draft business plan
- 2 yrs of financial projections
- 3 yrs of personal tax returns
- Personal financial statement

Existing Business Check-list:

- Draft business plan
- 2 yrs of financial projections
- 3 yrs of financial statements
- 3 yrs of personal tax returns
- Personal financial statement

Notes:
