



Self-Employed Business Narrative Form

This form is to be completed by borrower/business owner, broker and it can also be completed by a third-party individual with direct knowledge of the borrower's business, such as a Certified Public Accountant, an IRS Enrolled Agent, or Certified Tax Preparer.

1. Name of business:

2. Ownership percentage: _____ If less than 100%, who owns the remaining portion and what percentage?

3. Date business was established: _____

4. Date client obtained ownership: _____

5. Business legal structure:

☐ Partnership ☐ Corporation ☐ Sub-S Corporation ☐ Limited Liability Company

☐ Sole Proprietor

6. Business registered in State: _____

7. Industry Type & Nature of the business:

Signature:

Revised 04/10/2025