

TAX PROFESSIONAL ATTESTATION

TAX PROFESSIONAL INFORMATION

Business Name: _____

Business Address: _____

Email: _____

Phone: _____

CTEC/CPA/EA #: _____

BORROWER INFORMATION

Borrower Name: _____

Business Name: _____

Business Address: _____

Ownership Percentage (%): _____

Date borrower became legal owner of business: _____

Did you file the borrowers most recently filed tax return? Yes No

Do you have any relationship to the borrower or any association with the business? Yes No

 If yes, please explain: _____

Have you performed either of the following functions:

Audited the business financial statements, or	Yes	No
Reviewed working papers provided by the borrower	Yes	No

What is the business expense factor as a percentage of gross revenue? (10% Floor) _____

Does this expense factor represent an accurate summary of the business's applicable cash expenses? Yes
No

Type of Business: _____

Is Business in Good Standing: Yes No

Additional Comments:

Print Name: _____

Signature: _____

Date: _____

* Must be wet signed or DocuSign may be eligible if accompanied by a Certificate of Completion originating from the tax preparer.

** Please send Tax Professional license with this attestation

***Self-Employed borrowers who file their own tax returns are not eligible