Loan Client Checklist - Youth

Discovery
___ Intake survey
___ Initial visit with Akiptan’s staff

Technical Assistance and Completion
___ Loan Application (included Balance Sheet & Cash Flow Projections)
___ Co-Signor's Driver's License (must be parent or guardian)
___ Driver’s License (if applicable)
___ Proof of Enrollment
___ Cattle/Horse Brand (if applicable)
___ Lease Agreement (if applicable)
___ Labor Trade Agreement (if applicable)
___ Detailed Loan Narrative and Loan Funds Budget
___ Financial Literacy Coursework
___ Cattle Growth Chart (if applicable)

Review and Closing
___ Detailed Record of Collateral is Sent to Loan Staff
___ Loan Agreement is Signed
___ Security Agreement is Signed
___ Privacy Statement is Received
___ Note of Credit Reporting is Received

Aftercare
___ Receipts/Invoices/Quotes/Titles are Submitted
___ Proof of Insurance (if applicable)
___ Quarterly Check-Ins
___ Annual Financial Reviews
___ Yearly taxes