



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

