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| Category | Question |
| Experience | What qualifications do you have? |
|  | Have you assisted in preparing loan applications previously? |
|  | Can you provide me with contact details of previous clients? |
|  | Have you been successful in previous loan applications? |
|  | Have you worked with similar businesses in my industry? |
|  | How long have you been in business? |
|  | What industry knowledge do you have? |
| Type of assistance | What type of services do you provide?  |
|  | What parts of the loan application will you help me prepare? |
|  | Will you inform me of the most appropriate loan for my business and make a suggestion on the most appropriate lender? |
|  | Will you inform me if a loan is not appropriate for my business and if so, make recommendations on how best to meet my funding needs? |
|  | Will you assist my business if the loan is approved? |
|  | Do you have an example of a successful loan application I can review? |
|  | What type of information will you require from me? |
|  | Will you be the one providing the assistance? |
|  | What is your or your associate’s availability for this assistance? |
| Service | What level of communication will be offered? |
|  | What other services do you provide that can help my business? |
|  | Do you have any research information that can be used in my loan application? |
| Remuneration | How much will your services cost?  |
|  | How are you remunerated? |