THINK LIKE A BANKER:
THE 5-STEP BLUEPRINT TO GETTING YOUR BUSINESS FUNDED

Who Should Attend

- Entrepreneurs considering starting a business
- New business owners
- Existing businesses preparing to seek financing
- Business owners wanting to better understand their financial statements

What You'll Gain

- ✓ Learn how bankers evaluate loan applications
- ✓ Understand the financial statements lenders rely on
- ✓ Build confidence in discussing your business finances
- ✓ Prepare a stronger loan package
- ✓ Position your business for funding success

What if you knew exactly what a banker looks for before you applied for financing?

Whether you're starting a business or preparing for your next stage of growth, this five-part workshop series will help you understand how lenders evaluate your business and what you can do today to improve your chances of securing financing.

Workshop Schedule

Wednesday, August 12, 2026 | 4:00-5:30 pm
1. Personal Financial Statement, Credit Report, and Income
It all starts with you. Let's explore how banks evaluate your personal information and what you can do to strengthen it.

Wednesday, August 26, 2026 | 4:00-5:30 pm
2. The Business Balance Sheet and its significance
Why do most bankers look at your Business Balance Sheet first, and what are they looking for? You should be looking at the same thing; let's talk about it.

Wednesday, September 9, 2026 | 4:00-5:30 pm
3. The Business Income Statement, Cash Flow, Projections
How to lay out your Income Statement with Variable Costs and Fixed Costs and why that is important. How do banks assess your CF and repayment ability using your Income Statement.... and your Balance Sheet. Projections are easier than you think!

Wednesday, September 23, 2026 | 4:00-5:30 pm
4. Small Business Startup and Lending Prep Training
First things first... but what are the "first things"? What does any banker, or investor want to see and why?

Wednesday, October 7, 2026 | 4:00-5:30 pm
5. Types of Business Loans and when to use them/Pick a good banker
What type of loan do you need, and where can you find it? Picking an informed and helpful banker will help you more effectively and longer than just picking a bank. It is worth the effort!

Presenter Karen Thompson
Business Banking Professional

Registration Required.
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