

MCA DEBT ASSESSMENT

Business & contact information

Complete all three pages, save the filled PDF, and email it with the supporting documents listed on page 3. Use estimates if exact balances are unavailable. Enter N/A where a question does not apply.

BEFORE YOU BEGIN

Minimum total MCA / business debt: \$50,000. Other criteria are on page 3.

1 Business details

Full legal business name

DBA / trade name (if different)

Type of business / industry

Business city and state

Date completed (MM/DD/YYYY)

2 Owner & guarantor

Owner full name

Guarantor full name (if different)

Best direct contact number

Owner / merchant email

3 Submitted by

Contact name / company (if applicable)

Contact phone

MCA DEBT ASSESSMENT

Debt, payments & current situation

Provide estimated current balances, rather than original advance amounts. List each position below; attach an additional list if needed. Select a payment frequency for each position.

4 Debt & payment overview

Total estimated outstanding MCA / business debt (\$)

Sustainable weekly payment for the business (\$)

Combined current daily payments (\$, if applicable)

Combined current weekly payments (\$, if applicable)

CURRENT POSITIONS

Lender / funder	Est. balance (\$)	Payment (\$)	Frequency
			Select
			Select
			Select
			Select
			Select

Check all that apply. Provide details in the summary below.

- ☐ Multiple / stacked MCAs
- ☐ Cash flow strain
- ☐ Revenue decline
- ☐ Aggressive collections
- ☐ Defaults / missed payments
- ☐ Liens
- ☐ Lawsuits / pending legal actions
- ☐ Judgments

Brief situation summary, legal details, deadlines and other payment frequencies

MCA DEBT ASSESSMENT

Documents & submission checklist

EMAIL COMPLETED FORM & DOCUMENTS TO

mikelewis@michaellewisgroup.com

Subject: [Business Name] | New Merchant Submission | [Your Company]

5 Qualification checklist

Confirm each item before submitting.

- ☐ Total MCA / business debt is at least \$50,000.
- ☐ Business has payment pressure, stacking, defaults or cash flow strain.
- ☐ Merchant is willing to provide supporting financial documentation.
- ☐ Owner is open to restructuring, modification or settlement options.

6 Supporting documents

Check each item included with this submission.

- ☐ Copies of all original MCA / lender agreements
- ☐ Most recent four months of business bank statements
- ☐ Current month-to-date business statement / activity
- ☐ Liens, lawsuits, judgments, default notices or pending-action documents
- ☐ No applicable legal / default documents to submit

Documents pending or other submission notes (enter N/A if none)

Save your completed PDF before attaching it. Our team will review the submission to determine available options and request any additional information needed.