

[Financial Institution Name]
[Department Name]
[Street Address]
[City, State, Zip Code]
[Date]

[Business Owner Name]
[Business Name]
[Business Address]
[City, State, Zip Code]

Subject: Annual Review of Small Business Credit Facility - [Account/Loan Number]

Dear [Business Owner Name],

As part of our commitment to supporting your business, [Financial Institution Name] conducts periodic reviews of all small business lending relationships. This process ensures that your current credit facilities continue to meet your operational needs and align with our updated lending guidelines.

To complete this scheduled review, we kindly request that you provide the following updated documentation by [Due Date]:

- Business Tax Returns for the most recent two fiscal years.
- Year-to-date Profit and Loss Statement and Balance Sheet.
- Personal Financial Statement for all guarantors.
- Current Business Debt Schedule.

Our review team will evaluate your business performance, cash flow, and credit standing. Once the review is complete, we will contact you to discuss the status of your credit line/loan and any potential opportunities for credit expansion or restructuring based on your current growth.

Please submit the requested documents via our secure portal at [Web Link] or deliver them to your local branch office.

If you have any questions regarding this request, please contact your Relationship Manager, [Manager Name], at [Phone Number] or [Email Address].

Thank you for choosing [Financial Institution Name] as your business partner.

Sincerely,

[Signature]
[Name of Officer]
[Title]
[Financial Institution Name]