

Business Information & Loan Request

Business Name

Street Address

City

State

Zip

Mailing address if different

Web Site Address

E-mail Address

Key Contact

Phone ()

Fax ()

Tax ID Number

Date Business Established

Number of Employees at Present

After this Loan

Ownership & Management Structure

Sole Proprietorship Corporation Professional Corporation

LLC (Limited Liability Company) LLP (Limited Liability Partnership)

General Partnership Limited Partnership Other

Officers/Members/Partners/Owners

Title	Full Legal Name	Ownership Interest %
1.		%
2.		%
3.		%
4.		%
5.		%

Directors (Please list directors, only if different from shareholders and officers listed above.)

Have there been any ownership changes in the operating entity in the last six months? Yes No

Business Contacts

	Name	Telephone
Accountant		
Attorney		
Insurance Agent		
Banker		

Affiliate Businesses

Does your business own or have an interest in other business(es)? Yes No

If "Yes," please provide the company name(s), a description of the business and the relationship with your company along with the most recent 3 years tax returns, a current interim financial statement and debt schedule for each:

Business Information & Loan Request

(continued)

Estimated Project Costs/Use of Proceeds

Real Estate Purchase	
Existing building	\$
Vacant land	\$
Estimated cost of construction/improvements to property.	\$
SBA Loans Only: Does the seller have an existing SBA loan? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown	
Business Acquisition	
Purchase price of business?	\$
SBA Loans Only: Does the seller have an existing SBA loan? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unknown	
Debt Refinance - Do you want to refinance existing business debt?	
Existing SBA loan(s)	\$
Existing real estate loan(s)	\$
Existing business loan(s)	\$
Other	
Machinery & Equipment purchase	\$
Inventory purchase	\$
Working capital requirements	\$
Franchise Fees	\$
Leasehold Improvements	\$
Other	\$
Total Estimated Loan Request	
Proposed downpayment	(\$)
Seller financing as part of the transaction	(\$)
Gift Funds as part of your downpayment?	(\$)
Total Estimated Loan Request	\$

Ownership of New Assets

Under what name do you wish to take title?	
Name	
Will the real estate or equipment be held by you (or you and your spouse) personally? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If "No," please describe the holding entity: <input type="checkbox"/> Existing <input type="checkbox"/> To be formed	
<input type="checkbox"/> Corporation	<input type="checkbox"/> Trust/Type:
<input type="checkbox"/> LLC (Limited Liability Company)	<input type="checkbox"/> LLP (Limited Liability Partnership)
<input type="checkbox"/> General Partnership	<input type="checkbox"/> Limited Partnership <input type="checkbox"/> Other

Officers/Members/Partners/Beneficiaries/Trustees		
Title	Full Legal Name	Ownership Interest %

Signature	Date
Print Name	Title