

Referral Application



Business Name: _____ Tax ID# _____

Type of Business: _____ Contact Name: _____

Website: _____ Contact Phone: _____

Business Physical Address: _____ Contact Email: _____

Street Address _____ Suite _____ City _____ State _____ Zip _____

Corporation Limited Liability Company Partnership Proprietorship

Owners / Principals

Name _____ Title _____ Ownership % (must total 100%) _____

Number of Employees _____ Number of Employees you will hire as a result of the proposed loan _____

Does this business or any of the principals have a controlling interest in any other business? No Yes

If yes, please provide details: _____

Number of Employees of affiliated Business(es) _____

Has the business or any principal ever (if yes, please provide details):

Declared Bankruptcy? No Yes _____

Applied for government financing (including student loans) No Yes _____

Is the business currently involved in pending lawsuits? No Yes _____

Proposed real property vesting (if applicable): LLC Corp. Partnership Individuals Trust Other

Escrow contact information: _____

Use of Loan Proceeds

Amount

Purchase Real Property \$ _____

Debt Refinance *(Please provide a copy of note to be paid off)* \$ _____

Property Improvements \$ _____

Working Capital \$ _____

Purchase of Furniture, Fixtures and/or Equipment
(Please provide invoices or purchase order) \$ _____

Purchase Inventory \$ _____

Other \$ _____

Less Borrower's Down Payment \$ _____

Total Loan Request \$ _____

Source of Down Payment _____

Borrower Signature _____ Title _____ Date _____

Business History

Providing as much detail as possible will help expedite your loan request. Attach sheet if necessary.

1. When and how was the business established?

2. When and how did current owners acquire the business?

3. Nature of business (including types of products and services offered)?

4. Key customers?

5. Target market?

6. Major competitors?

7. Your advantage over competitors?

8. Major suppliers?

9. General geographic market served?

10. How will the proposed loan benefit your company?