



Fill this in on your computer (or print and write clearly), save it, and reply to our email with it attached. Rough numbers are fine. Please do NOT write your SSN, EIN or bank account numbers here; we collect those securely in your portal.

CONTACT

Your name	Email	Phone

LOAN REQUEST

Loan type	Amount requested (\$)	When do you need it?	Purchase price, if buying (\$)

What the money is for	Business being acquired (if any)

BUSINESS

Legal business name	DBA (if any)	Entity type

Business address	Year started	Employees	NAICS (optional)

What the business does	Revenue, last year (\$)	EBITDA / net income (\$)	Website

OWNERS (EVERYONE WITH 20% OR MORE)

Owner 1 full legal name	Title	Ownership %	Willing to guarantee?
Owner 2 full legal name	Title	Ownership %	Willing to guarantee?
Owner 3 full legal name	Title	Ownership %	Willing to guarantee?
Owner 4 full legal name	Title	Ownership %	Willing to guarantee?



AFFILIATED COMPANIES

Do the owners own other companies?

If yes: names and relationship

COLLATERAL, BANKING & EXISTING DEBT

Collateral available (e.g. real estate, equipment, receivables, inventory)

Other collateral

Property address (real estate loans)

Equipment description

Primary bank

Banking there since (year)

Total existing business debt (\$)

Existing loans: lender, balance, monthly payment (one per line)

Why a new loan or new bank now?

BACKGROUND (LAST 10 YEARS)

Any bankruptcy?

If yes, briefly explain

Any judgments?

If yes, briefly explain

Any tax liens?

If yes, briefly explain

Any pending lawsuits?

If yes, briefly explain

ANYTHING ELSE WE SHOULD KNOW

Notes

By returning this form you confirm it is accurate to the best of your knowledge. We will ask for your authorization to share it with banks before we do.