

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 <i>(Please provide a copy of note to be paid off)</i>	\$ _____
Property Improvements	\$ _____
Working Capital	\$ _____
Purchase of Furniture, Fixtures and/or Equipment <i>(Please provide invoices or purchase order)</i>	\$ _____
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?