



## BUSINESS LOAN APPLICATION

### BUSINESS INFORMATION:

Business Name: \_\_\_\_\_ TIN/SSN: \_\_\_\_\_

Address: \_\_\_\_\_ Business Phone: \_\_\_\_\_  
\_\_\_\_\_ Fax: Home: \_\_\_\_\_

Date Business Started: \_\_\_\_\_ Present Management Since: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

Brief Description of Business: \_\_\_\_\_

Type of Business Organization:     Sole Proprietor     Partnership     C Corp.     S Corp.     LLC

### OWNERSHIP:

Owner 1: \_\_\_\_\_ % owned \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_ SSN: \_\_\_\_\_

Date of Birth \_\_\_\_\_

Owner 2: \_\_\_\_\_ % owned \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_ SSN: \_\_\_\_\_

Date of Birth \_\_\_\_\_

### ADDITIONAL GUARANTORS:

Name: \_\_\_\_\_ Address: \_\_\_\_\_ SSN: \_\_\_\_\_

Name: \_\_\_\_\_ Address: \_\_\_\_\_ SSN: \_\_\_\_\_

### LOAN REQUEST:

Amount: \$ \_\_\_\_\_ Type:  Line of Credit     Term Loan    Term: \_\_\_\_\_

Requested Repayment \_\_\_\_\_

Purpose:     Working Capital     Refinance Existing Debts     Purchase Equipment     Purchase R/E  
Other: \_\_\_\_\_

Available

Collateral:     All Assets (accounts receivable, inventory, machinery and equipment)  
 Specific Equipment (please attach equipment list, including serial numbers and invoices)  
 Real Estate (please attach property address, type and most recent tax bill)  
 Other: \_\_\_\_\_

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### BUSINESS ACCOUNT REFERENCES:

Accounts with Credit Union# \_\_\_\_\_ Average Balance: \$ \_\_\_\_\_  
Credit Union# \_\_\_\_\_ Average Balance: \$ \_\_\_\_\_  
Accounts with other Financial Institutions: Bank \_\_\_\_\_ Average Balance \_\_\_\_\_

### CURRENT BUSINESS DEBT:

1. Loan Type:  LOC  Term

Rate: \_\_\_\_\_

Original Amount: \_\_\_\_\_

Current Balance: \_\_\_\_\_

Monthly Payment \_\_\_\_\_

Collateral \_\_\_\_\_

Loan Type:  LOC  Term

Interest Rate \_\_\_\_\_

Original Amount: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_

Collateral: \_\_\_\_\_

### PROFESSIONAL ADVISORS:

Name of Accountant: \_\_\_\_\_ Phone \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

Name of Insurance Company: \_\_\_\_\_

Agents Name: \_\_\_\_\_ Phone \_\_\_\_\_ Fax: \_\_\_\_\_

Address \_\_\_\_\_

### TRADE REFERENCES:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### MISCELLANEOUS INFORMATION:

Are tax liabilities current?  Yes  No Settled Through Date: \_\_\_\_\_

Has the business or principals ever declared bankruptcy?  
(If yes, explain circumstances on separate sheet)  Yes  No

Has the business incurred a loss within the past 3 years?  
(If yes, explain circumstances on separate sheet)  Yes  No

Is the business for sale or under agreement that would change the  
ownership of the business?  Yes  No  
(If yes, explain circumstances on separate sheet)

Are any officers, directors, key managers or owners of 20% or more  
of the company presently under indictment or on parole/probation?  
(If yes, explain circumstances on separate sheet)  Yes  No

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**CERTIFICATION:**

The undersigned certifies that, to the best of his or her knowledge and belief, all information contained in this loan application and in the accompanying statements and documents is true, complete and correct, and agrees to notify the Credit Union immediately of any material changes in this information. The undersigned authorizes the Credit Union to to Dunn & Bradstreet or information from any Credit Bureau reporting agency.

Business Name (print) \_\_\_\_\_

Applicant Signature: \_\_\_\_\_ Title \_\_\_\_\_ Date: \_\_\_\_\_

Guarantor(s) Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Guarantor(s) Signature: \_\_\_\_\_ Date: \_\_\_\_\_