

**Member Account #:** \_\_\_\_\_

Business Name: \_\_\_\_\_ Federal Tax I.D.#: \_\_\_\_\_

Business Physical Address: \_\_\_\_\_

Business Mailing Address (if different): \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Business Email: \_\_\_\_\_ Web Address: \_\_\_\_\_

Nature of your Business: \_\_\_\_\_ Date Established: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

Years at Current Location: \_\_\_\_\_ Do you Own or Lease:      Own      Lease

Business Type:      Partnership      Corporation      LLP      Sole-Proprietorship      LLC

Business Gross Annual Sales Last Fiscal Year (whole dollars): \_\_\_\_\_ Business Net Profit Last Fiscal Year (whole dollars): \_\_\_\_\_

## CONTACT INFORMATION

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Title: \_\_\_\_\_ Phone: \_\_\_\_\_

## OWNER/GUARANTOR INFORMATION

### Ownership Distribution (list stockholders, partners and owners of 20% or more):

(1) Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**Gross Monthly Income:** \_\_\_\_\_ **Source of Income:** \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Title: \_\_\_\_\_ Number of Years: \_\_\_\_\_ Ownership Percentage: \_\_\_\_\_

For security purposes, please provide your mother's maiden name: \_\_\_\_\_

(2) Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**Gross Monthly Income:** \_\_\_\_\_ **Source of Income:** \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Title: \_\_\_\_\_ Number of Years: \_\_\_\_\_ Ownership Percentage: \_\_\_\_\_

For security purposes, please provide your mother's maiden name: \_\_\_\_\_

(3) Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**Gross Monthly Income:** \_\_\_\_\_ **Source of Income:** \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Title: \_\_\_\_\_ Number of Years: \_\_\_\_\_ Ownership Percentage: \_\_\_\_\_

For security purposes, please provide your mother's maiden name: \_\_\_\_\_

For additional stockholders, please attach an additional sheet.

**CONTROL PERSON**

**Provide the following information for one individual with significant responsibility for managing the legal entity listed above, such as:**

An executive officer or senior manager (e.g., Chief Executive Officer, Chief Financial Officer, Chief Operating Officer, Managing Member, General Partner, President, Vice President, Treasurer); or any other individual who regularly performs similar functions (if appropriate, an individual listed under the above section above may also be listed in this section.)

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Title: \_\_\_\_\_ Passport or Other ID #: \_\_\_\_\_ County of Issuance: \_\_\_\_\_

**LOAN REQUEST INFORMATION**

Loan Amount Requested: \_\_\_\_\_ Loan Purpose: \_\_\_\_\_ Term: \_\_\_\_\_  
 Type of Loan Requested:      Unsecured Installment      Overdraft Line of Credit      Vehicle - Make: \_\_\_\_\_ Model: \_\_\_\_\_

\*Minimum amount of \$5,000 and maximum of \$50,000 for Unsecured Loans. Term can be for 12-60 months.  
 \*Minimum amount of \$5,000 and a maximum of \$10,000 for Overdraft Line of Credit requests.  
 \*Minimum amount of \$5,000 and a maximum of \$50,000 for Vehicle Loans. Term can be for 12-84 months.

**BUSINESS BACKGROUND INFORMATION**

Please provide a brief history of your business, future plans and projections, and describe your products and/or services and competition:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**PERSONAL BUSINESS EXPERIENCE**

If you have been in your current business for less than five years, please describe your previous business experience. (Include business background, management experience, and training, or include a resumé.)

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**MISCELLANEOUS**

Are your tax liabilities current?      Yes      No      Settled Through: \_\_\_\_\_  
 Is the business an endorser, guarantor, or co-maker for any obligation not listed in the financial statements?      Yes      No  
 Has the business or any principal owner ever declared bankruptcy?      Yes      No  
 If yes, please provide details: \_\_\_\_\_  
 Is the business a defendant in any lawsuit?      Yes      No  
 If yes, please provide details: \_\_\_\_\_

**CERTIFICATIONS**

The undersigned certify 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. The undersigned agrees to notify the Credit Union immediately of any material changes in this information. The undersigned authorizes the Credit Union to contact any bank and trade creditors it deems necessary without further notice.

Business Name: \_\_\_\_\_ Date: \_\_\_\_\_

Owner/Guarantor Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Owner/Guarantor Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Owner/Guarantor Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_