

Application

Business Name: _____

Trade Name: _____

Current Address: _____

Project Address: _____

Contact Person: _____

Phone Number: _____

Email: _____

Cell Number: _____

Website: _____

Year Established: _____

Tax Id #: _____

Business Type:

- Sole Proprietor Partnership Limited Liability Comp. Trust
 S Corporation Other: _____

Any Prior Government Financing?

- Yes, Personal Yes, Business Yes, Both None

Have you/business ever filed for bankruptcy?

- Yes No If yes, please provide a letter of explanation.

Are you/business currently involved in any lawsuits?

- Yes No If yes, please provide a letter of explanation.

Is your Business a Franchise?

- Yes No If yes, please provide the franchise agreement.

Does your business export?

- Yes No If yes, is it more than 10% of your gross revenue?

How did you hear about us?

- Bank Presentation Website Newsletter Webinar: _____
 Referral: Who _____ Other: _____

Project Property:

How man square feet is this project facility? _____

How many square feet of the facility will the business occupy? _____

How large is the parcel of land this facility occupyes? _____

Approximately when was this facility built? _____

Please describe the facility: _____

Are there existing tenants? Yes No If yes, # of months remain on current tenant lease? _____

Current Full Time employees? _____ Estimated jobs created in the next 2 years due to this project? _____

How many employees would you need to let go if you were not doing this project? N/A or _____

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Ownership Structure:

Key Principal:	Title	Ownership %
Owner/Key Employee:	Title	Ownership %
Owner/Key Employee:	Title	Ownership %
Owner/Key Employee:	Title	Ownership %

Proposed Use of Funds:

Land Purchase:	\$
Land & Existing Building Purchase:	\$
Building Construction/Renovation:	\$
Equipment Purchase/Installation:	\$
Purchase/Installation of Fixtures:	\$
Refinance Eligible Debt:	\$
Professional Fees (i.e. Appraisals, Environmental):	\$
Other Fees (Interest, eligible business costs):	\$
Contingency (Up to 10% of construction):	\$
TOTAL PROJECT COST:	\$

Will you be meeting any of the Green Initiatives?

Reduce Energy consumption by at least 10%? Yes No

Increased use of sustainable design? (low impact materials) Yes No

Plant, equipment and process upgrades of renewable energy? (install solar panels) Yes No

Additional Questions:

What is the nature of your business? _____

What type of products or service do you provide? (Feel free to include any catalogs or brochures) _____

What is your geographic market area? _____

Please list any current key customers: _____

Have you ever served in the military? Yes No If yes, please provide: rank and years served – rank achieved, any special training, commendations or awards _____

May we reference your business as a “Success Story” in our publications: Yes No

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Business Debt Schedule

Indebtedness: Furnish the following information on all installment debts, contracts, notes and mortgages payable. Please do not include accounts payable or accrued liabilities.

Company Name: _____ Date*: _____

<i>Creditor: Name/Address</i>	<i>Original Amount</i>	<i>Original Date</i>	<i>Present Balance</i>	<i>Interest Rate</i>	<i>Maturity Date</i>	<i>Monthly Payment</i>	<i>Security</i>	<i>Current or Delinquent</i>
Total Present Balance**				Total Monthly Payment				

*Should be the same date as current financial statement.

**Total must agree with balance sheet shown on current financial statement.

Signature: _____ Date: _____

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Government Debt Schedule

Include any previous government loans such as student loans, FHA, VA etc.

Individual Name: _____

<i>Creditor: Name/Address</i>	<i>Original Amount</i>	<i>Original Date</i>	<i>Present Balance</i>	<i>Maturity Date</i>	<i>Monthly Payment</i>	<i>Collateral/ Security</i>	<i>Status of Loan</i>
Total Present Balance							

Signature: _____ Date: _____

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Resume Form

It is important for us to have an understanding of the **management background** and **experience of the principals** involved with the business applying for financing. Please **attach resumes for any key owners or managers involved with the business**, or complete this form. Please make additional copies as needed.

Name: _____ Address: _____
 City: _____ State: _____ Zip: _____ Phone: _____
 Cell: _____ Email: _____

Employment History *(List chronologically, beginning with current employment).*

Company Name _____ **Type of Business** _____
 Address: _____
 City: _____ County: _____ State: _____ Zip: _____
 Position/Duties _____
 Here From _____ Until _____

Company Name _____ **Type of Business** _____
 Address: _____
 City: _____ County: _____ State: _____ Zip: _____
 Position/Duties _____
 Here From _____ Until _____

Company Name _____ **Type of Business** _____
 Address: _____
 City: _____ County: _____ State: _____ Zip: _____
 Position/Duties _____
 Here From _____ Until _____

Education History

Name of Institution	City, State	Degree/Certificate	Yr Graduated
High School _____	_____	_____	_____
College/University _____	_____	_____	_____
Technical School _____	_____	_____	_____
Graduate School _____	_____	_____	_____

Military History Have you ever served in the military? Yes _____ No _____

If Yes, please provide the following: branch and years served – rank achieved, and any special training, commendations or awards _____

Voluntary Questions: (Race and ethnicity disclosure is voluntary. This data is collected for U.S. Small Business Administration statistical purposes only. It has no bearing on credit decision. One or more boxes for race may be selected):

Race: American Indian or Alaska Native Black or African American Native Hawaiian or Pacific Islander Asian White
Ethnicity: Hispanic/Latino Not Hispanic or Latino

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Application and Deposit Acknowledgment and Consent Form

I, _____, as _____ of _____ (“Applicant”), hereby acknowledge that Applicant has submitted to Preferred Lending Partners (“PLP”) an application for a Small Business Administration (“SBA”) 504 Loan (hereinafter referred to as the “504 Loan”). Applicant understands that part of the application process involves PLP’s and the SBA’s review and analysis of Applicant’s (and any guarantor of the 504 loan) financial information. Applicant (and any guarantor of the 504 Loan) hereby grants PLP authorization to review its/their business and personal financial information.

Additionally, Applicant acknowledges and understands that PLP requires that Applicant make two (2) deposits to PLP that will be credited towards the closing costs for the 504 Loan and/or other lending fees associated with the 504 Loan at the time the 504 Loan is funded. The first deposit is the “Application Deposit” of \$1,000, which is due to PLP at the time of PLP’s Internal Loan Committee Approval of Applicant’s 504 Loan. The second deposit is the “Commitment Deposit” of 1% of the 504 Loan or \$2,500 (whichever is greater, with a maximum of \$7,000), which is due to PLP upon the SBA’s approval of Applicant’s 504 Loan and the issuance of the SBA Authorization for Debenture Guarantee.

Applicant understands and agrees that in the event Applicant’s application for the 504 Loan is rejected for any reason by either PLP or the SBA, the amount paid by Applicant for the Application Deposit and the Commitment Deposit will be refunded to Applicant, less any administration fees/expenses incurred by PLP during the application review process. In the event Applicant’s 504 Loan is approved by PLP and the SBA, all deposits will become nonrefundable and will be credited towards the Applicant’s closing fees/expenses to be applied at the time the 504 Loan is funded; provided, however, that Applicant has the option to finance the closing costs as part of the 504 Loan. In the event Applicant elects to finance the closing cost as part of the 504 Loan, Applicant will still be required to pay the Application Deposit and the Commitment Deposit, but the deposit amounts will be refunded to Applicant at Closing of the 504 Loan and the actual closing costs will be added to the principal amount of the 504 Loan. If Applicant decides to withdraw its application prior to PLP’s and SBA’s approval of the 504 Loan, PLP has the right to invoice Applicant for any loan processing fees/expenses incurred by PLP that exceed the amount of the above-mentioned deposits to cover such costs.

Please Note: The deposits collected by PLP do not ensure that additional funds will not be required to be paid by Applicant at the time the 504 Loan is funded.

Applicant will receive an invoice for the Application Deposit once PLP’s Internal Loan Committee has approved Applicant’s application for the 504 Loan. Applicant will also receive an invoice from PLP for the Commitment Deposit once Applicant’s 504 Loan is approved by PLP and the SBA Authorization for Debenture Guarantee is issued.

Applicant hereby certifies that the information provided in the application and other supporting documentation is true and correct to the best of the undersigned’s knowledge.

Applicant hereby authorizes PLP to conduct whatever credit history investigation is necessary for PLP’s loan review process, including obtaining any applicable credit bureau reports for Applicant and any guarantor.

Applicant hereby authorizes PLP to share any of Applicant’s financial information with a potential banking partner in connection with Applicant’s 504 Loan.

Applicant hereby authorizes the title company to perform any investigation required for its due diligence in the preparation of the disbursement of funds for the 504 Loan.



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SELLER(S) CREDITS CANNOT AND WILL NOT BE ACCEPTED AS PART OF THE SBA 504 LOAN STRUCTURE.

Applicant (and each guarantor) hereby indemnifies and holds PLP and/or its agents harmless from any and all loss or injury, including reasonable attorneys' fees, resulting or arising from failure by Applicant to receive such loan, and/or any loss or liability to Applicant or the business of Applicant. Applicant acknowledges and agrees that there are no other promises, terms, or agreements (oral or written) between PLP and Applicant, and that the SBA 504 Loan Program rules and fees are subject to change at any time.

GUARANTOR(S):

Print name of Guarantor

Print name of Guarantor

Signature of Guarantor

Signature of Guarantor

Date: _____

Date: _____

GUARANTOR(S):

Print name of Guarantor

Print name of Guarantor

Signature of Guarantor

Signature of Guarantor

Date: _____

Date: _____