

# Member Business Credit Application

To Process This Application, All Requested Information Must Be Provided

- New Request     
  Renewal     
  Modification

## Section I-General Information

Company Legal Name	Telephone Number		
Company Address	City	State	Zip
Company Mailing Address	City	State	Zip
Are Facilities Owned or Leased	Monthly Payment	Years in Business	
Tax ID Number:	Type of Business (NAICS)	Gross Annual Sales	

Business Structure   
  Proprietor   
  Partnership   
  S-Corporation   
  C-Corporation   
  Limited Liability Corp/Comp.

## Section II-Credit Request Information

How much would you like to borrow and what are the requested repayment terms?: \$ Term: How are you using these funds?:  
 What is your collateral and its estimated value?:

## Section III-Company Owners (20% or more) If Applicable, otherwise, Company Officers

Name Title Percentage of Ownership

## Section IV-Outstanding Business Loans, Including those with this Credit Union

Lender	Type of Loan	Current Balance	Monthly Payment	Secured by
Totals				

## Section V-Other Information

Any unsettled lawsuits, judgments or disputes?       Yes       No

If yes, what and why: \_\_\_\_\_

Bankruptcy ever filed by business?     Yes     No    If yes, when? \_\_\_\_\_

Any outstanding tax obligations?     Yes     No    If yes, why? \_\_\_\_\_



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## Section VI-Other Financial Services Used by Company/Owner

Service	Yes	No	If yes, Name of Provider
Checking Account	<input type="checkbox"/>	<input type="checkbox"/>	_____ Balance _____
Savings Account	<input type="checkbox"/>	<input type="checkbox"/>	_____ Balance _____
Cash Management	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other	_____		

This Credit Union may check credit and trade references in reviewing this application, and disclose information about its credit experience with applicant, as authorized by law. This Credit Union may also check the personal credit history of the principal owner(s) and/or key individual(s). In addition to the information requested on this application, this Credit Union may subsequently request additional information from the applicant. Applicant authorizes the Credit Union to disclose this information contained in this application, any credit report and personal financial information with the Credit Union's Servicer solely for the purposes of underwriting this loan. Applicant authorizes the Credit Union to obtain a Business Credit Report through its Servicer. As an authorized agent of the applicant company, I have stated that everything in the application and information submitted along with the application is true. I (we) agree that this Credit Union may provide information about me (us) or my (our) account to others.

Authorized Signature (Must be an Officer of Company)	Authorized Signature (Must be an Officer of Company)
Printed Name	Printed Name
Title	Title
Date	Date



# Personal Financial Statement

To Applicant: Prepare for Each Person Owning 20% or More of Business

## Applicant 1

Name \_\_\_\_\_ Social Security Number \_\_\_\_\_ Date Of Birth \_\_\_\_\_

Home Address \_\_\_\_\_ Home Phone \_\_\_\_\_

## Applicant 2

Name \_\_\_\_\_ Social Security Number \_\_\_\_\_ Date Of Birth \_\_\_\_\_

Home Address \_\_\_\_\_ Home Phone \_\_\_\_\_

### INSTRUCTIONS

1. Total Assets should equal Total Liabilities + Net Worth

Date of Statement: \_\_\_\_\_

2. Please note a jointly owned asset by checking Jointly Owned column (JO)

Assets	JO	
Cash (Schedule 1)	<input type="checkbox"/>	_____
Investments Marketable Stocks & Bonds (Schedule 2)	<input type="checkbox"/>	_____
Accounts & Notes Receivable	<input type="checkbox"/>	_____
Real Estate Owned (Schedule 3)	<input type="checkbox"/>	_____
Auto: Make/Year _____	<input type="checkbox"/>	_____
Auto: Make/Year _____	<input type="checkbox"/>	_____
Cash Value Life Insurance CSVLI (Sch. 4)	<input type="checkbox"/>	_____
Retirement/Profit Sharing Accounts (Sch 5)	<input type="checkbox"/>	_____
Business Ventures (Schedule 6)	<input type="checkbox"/>	_____
Other Assets	<input type="checkbox"/>	_____
<b>Total Assets</b>		_____
<b>Liabilities</b>		
Real Estate Mortgage(s) (Schedule 3)		_____
Installment Loans (Schedule 7)		_____
Credit Cards		_____
Federal Income Tax		_____
Other Liabilities		_____
<b>Total Liabilities</b>		_____
<b>Net Worth (Total Assets Minus Total Liabilities)</b>		_____
<b>Total Liabilities + Net Worth</b>		_____



# Personal Financial Statement

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## SOURCES OF INCOME

	Applicant 1	Applicant 2
Salary	_____	_____
Bonuses & Commissions	_____	_____
Dividends & Interest	_____	_____
Rents & Royalties	_____	_____
Other (Itemize):		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Total Annual Income** \_\_\_\_\_

ALIMONY-CHILD SUPPORT: Inclusion of alimony, separate maintenance or child support as income is voluntary and need not be revealed if you do not wish to have it considered. If you choose to include such payments, please describe if by the court and case number, the amount and the name and address of the person obligated to pay that amount to you. If you are responsible for paying alimony, separate maintenance or child support, please give particulars of the obligation along with your other obligations.

	Applicant 1	Applicant 2
Occupation/Type Of Business	_____	_____
Employer	_____	_____
How Long	_____	_____
Position Held	_____	_____
Number of Dependents	_____	_____

## Other Information

	Applicant 1		Applicant 2	
Endorser or Co-maker on Notes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Defendant In Any Legal Action?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
No Bankruptcy Ever Filed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Brief Description:				

