

**SBA Loan Application**

**OPERATING COMPANY INFORMATION**

Business Name \_\_\_\_\_ Structure: \_\_\_ Corporation \_\_\_ Partnership \_\_\_ Sole Prop \_\_\_ LLC  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Tax ID # \_\_\_\_\_ Date Established \_\_\_\_\_ Website \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

**OPERATING COMPANY OWNERSHIP (Please complete Addendum A for each 20% or more owner of the business)**

Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____

**PROJECT INFORMATION (Actual location of business)**

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Size (sq. ft.) of the proposed facility? \_\_\_\_\_

**BORROWING COMPANY INFORMATION (if different from above - use if a real estate holding company is applicable)**

Business Name \_\_\_\_\_ Structure: \_\_\_ Corporation \_\_\_ Partnership \_\_\_ Sole Prop \_\_\_ LLC  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Tax ID # \_\_\_\_\_ Date Established \_\_\_\_\_ Website \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_ E-mail \_\_\_\_\_

**BORROWING COMPANY OWNERSHIP (Please complete Addendum A for each 20% or more owner of the business)**

Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____
Name _____	Title _____	% Ownership _____	E-mail _____

**DETAIL OF PROPOSED USES OF FUNDS (PROJECT COSTS)**
**A. REAL ESTATE (New Purchase)**
**COMMENTS**

 Address: \_\_\_\_\_ \$ \_\_\_\_\_  
 (Complete Addendum C Section 2)

Total Cost \$ \_\_\_\_\_

**B. NEW CONSTRUCTION (to include remodeling & improvements)**

 Land: New Purchase \$ \_\_\_\_\_  
 (Complete Addendum C Section 3)

 Land: Previously Acquired \$ \_\_\_\_\_  
 (Complete Addendum C Section 3)

Building - New Construction Contract \$ \_\_\_\_\_

Remodeling Costs \$ \_\_\_\_\_

Leasehold Improvements \$ \_\_\_\_\_

Other (specify) \$ \_\_\_\_\_

Total Cost \$ \_\_\_\_\_

**C. MACHINERY/EQUIPMENT/FURNITURE/FIXTURES**

Machinery (provide list) \$ \_\_\_\_\_

Equipment (provide list) \$ \_\_\_\_\_

Furniture \$ \_\_\_\_\_

Fixtures \$ \_\_\_\_\_

Other (specify) \$ \_\_\_\_\_

Total Cost \$ \_\_\_\_\_

**D. OTHER**

Acquisition of Existing Business \$ \_\_\_\_\_

Inventory Purchase \$ \_\_\_\_\_

 Debt Refinancing \$ \_\_\_\_\_  
 (Complete Addendum B & Addendum C Section 4)

Working Capital \$ \_\_\_\_\_

Total Cost \$ \_\_\_\_\_

**TOTAL ESTIMATED PROJECT COST** \$ \_\_\_\_\_

**LESS OWN CASH/EQUITY TO BE USED IN PROJECT** \$ \_\_\_\_\_

**TOTAL LOAN REQUESTED FOR THE PROJECT** \$ \_\_\_\_\_

Brief Description of Project: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**SOURCE OF EQUITY INJECTION**

Cash \$ \_\_\_\_\_ Please provide a current bank statement verifying the funds are available.

Gift \$ \_\_\_\_\_ Please provide a copy of the gift letter as well as a current bank statement verifying the funds are available from the person giving the gift funds.

Seller \$ \_\_\_\_\_ Please provide a copy of the seller financing note outlining all terms and conditions.

**EMPLOYEE QUESTIONNAIRE**

Total Number of Existing Employees \_\_\_\_\_

The number of new employees anticipated as result of this project within the next two years:

Number of New Employees	Job Type
_____	_____
_____	_____
_____	_____
_____	_____

**HISTORY AND NATURE OF YOUR BUSINESS**

When was your company established and by whom? \_\_\_\_\_

\_\_\_\_\_

When was current ownership structure established? \_\_\_\_\_

What products or services do you provide? (Enclose any catalogs or brochures) \_\_\_\_\_

\_\_\_\_\_

What is your geographic market area? \_\_\_\_\_

Who are your major customers?

NAME	CITY, STATE, OR COUNTRY	PERCENT (%) SALES
_____	_____	_____
_____	_____	_____
_____	_____	_____

Who are your major suppliers?

NAME	CITY, STATE, OR COUNTRY	PRODUCT PURCHASED
_____	_____	_____
_____	_____	_____
_____	_____	_____

**HISTORY AND NATURE OF YOUR BUSINESS (Continued)**

Who are your major competitors?

NAME	CITY, STATE, OR COUNTRY	COMPETING PRODUCT
_____	_____	_____
_____	_____	_____
_____	_____	_____

How will the proposed SBA loan change or aid in the growth of your business? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**ADDITIONAL QUESTIONS**

- a. Are you or any owner delinquent on any business or personal taxes?  Yes  No
- b. Have you or any officer of your company ever been involved in bankruptcy or insolvency proceedings?  Yes  No
- c. Are you or your business involved in any pending lawsuits?  Yes  No
- d. Does any applicant or their spouse or any member of their household, or anyone who owns, manages or directs your business or their spouses or member of their households, work for the Small Business Administration, Small Business Advisory Council, SCORE or ACE, any Federal Agency, or the participating lender?  Yes  No
- e. Do you buy from, sell to, or use the services of any concern in which someone in your company has a financial interest?  Yes  No
- f. Is this business a start-up or has it operated less than 24 months?  
If Yes, please complete Addendum C Section 1  Yes  No
- g. Is this business a franchise?  
If Yes, franchise name \_\_\_\_\_ (Please provide a copy of the agreement)  Yes  No
- h. Does your business presently, or will it as a result of this loan, engage in export trade?  
If Yes, total export sales this loan would support \$ \_\_\_\_\_  Yes  No
- i. Does your company or any owner own title to a patented, trademarked, or copyrighted product?  Yes  No
- j. Does your company or any owner have an existing or prior SBA or other government loan?  
If Yes, please complete Addendum D  Yes  No
- k. Does or will the company lease any real estate for operations?  
If Yes, please provide a copy of the Current or Proposed Lease  Yes  No