

Company Information and Business History

OPERATING COMPANY		
Company Name		DBA (Trade Name)
Company Address (Street, City, ST, Zip)		
Mailing Address (if different than above)		
Company Website		
Principal in Charge	Phone	Email
Secondary Contact	Phone	Email
Type of Business		Date Established
Type of Entity		

Company Ownership

Name	Title	% Ownership
Name	Title	% Ownership
Name	Title	% Ownership
Name	Title	% Ownership
Name	Title	% Ownership

REAL ESTATE HOLDING COMPANY (if applicable) – if property is held personally, please indicate name here		
Company Name		Date Established
Mailing Address (if different than above)		
Company Website		
Principal in Charge	Phone	Email
Secondary Contact	Phone	Email
Type of Entity		

Company Ownership

Name	Title	% Ownership
Name	Title	% Ownership
Name	Title	% Ownership
Name	Title	% Ownership
Name	Title	% Ownership

PROJECT INFORMATION

Street Address of Property			
City	State	Zip	County
Square Footage of New Building		Square Footage Your Company Will Occupy*	
Previous Occupant/Business (if known)		*Please note: SBA requires your company to occupy 51% of an existing building and 60% of a new construction	
Realtor's Name			Phone
Escrow Closing Date			

TOTAL PROJECT COSTS

Purchase of Existing Building or Equipment Only		Construction Project	
Purchase Price	\$	Land Acquisition	\$
Remodel / Renovation	\$	Construction Bid	\$
Equipment	\$	Architects, Permits, Other Soft Costs	\$
Other / Refinance	\$	Equipment	\$
Total	\$	Other	\$
*Please note: Equipment to be financed must have a useful life of 10 years or greater		Total	\$

Describe How the Funds Will Be Used

Please explain where the down payment will come from (examples include: business funds, personal savings, home equity loan, equity in the building, own the land, seller carryback, investor, gift, etc.)

If there are any tenants that will lease a portion of the building, please provide the following information:

Tenant	Square Footage	Rent Amount

EMPLOYEES

Number of Current Employees	Full-Time:	Part-Time:
Estimated Number of Employees in Two Years as a Result of the Project	Full-Time:	Part-Time:

Key Employees

Title	Name	Responsibilities	Years With Company	Years in Industry

MISCELLANEOUS QUESTIONS

Have you or any of your company ever been involved in bankruptcy or insolvency proceedings? <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, please provide details on the notes page or on a separate, signed sheet. Also email/attach all bankruptcy discharge documents.</i>
Are you and your business involved in any pending or prior lawsuits? <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, please provide a written explanation on the notes page or on a separate, signed sheet</i>
Have you ever received an SBA loan? <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If yes, please provide a copy of the SBA loan Authorization and the following:</i> Original Amount: \$ _____ Date of Loan: _____ Current Balance: \$ _____ Status of Loan: _____ SBA Loan Number: _____

HISTORY AND DESCRIPTION OF BUSINESS

Company Name	
When and by whom was the company established? When did you get control of the business (if applicable)?	
Describe the primary products and service of the business.	
What is the geographic market served by the business? <input type="checkbox"/> International <input type="checkbox"/> National <input type="checkbox"/> State <input type="checkbox"/> Local Explain	
List key customers	List major competitors
Provide a detailed narrative history of the business (including business history, management history and approach, business model, competitive advantages, industry niche, growth strategy, and the effect the SBA 504 loan will have on business growth)	
Please attach or email (to loan officer) any website, news article, or other noteworthy company highlights/achievements	
Submitted By	Date

NOTES

Provide any notes or further explanations