

Company Information and Business History

OPERATING COMPANY		
Company Name	DBA (Trade Name)	
Company Address (Street, City, ST, Zip)		
Tax ID	Company Website	
Principal in Charge	Cell Phone	Email
Secondary Contact	Cell Phone	Email
Type of Business		Date Established

Company Ownership

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

*If there are more than four owners, please include them in the Notes section

REAL ESTATE HOLDING COMPANY (if applicable) – if property is held personally, please indicate name here		
Company Name	Date Established	
Tax ID	Company Website	
Principal in Charge	Phone	Email
Secondary Contact	Phone	Email

Company Ownership

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

*If there are more than four owners, please include in the Notes section

PROJECT INFORMATION	
Property Address	
Square Footage of New Building	Square Footage Your Company Will Occupy
Are you purchasing the leased space you currently occupy? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, what is your lease payment?
Are you moving from a leased space? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, what is your lease payment?
Are you expanding to an additional location? <input type="checkbox"/> Yes <input type="checkbox"/> No	

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	\$
Refinance	\$	Equipment	\$
Other / Fees	\$	Other	\$
Total		Total	\$

*Please note: Equipment to be financed must have a useful life of 10 years or greater

Any additional notes or details on project costs?

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

*Please note: SBA requires your company to occupy 51% of an existing building and 60% of a new construction

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

LOAN IMPACT

How will this loan benefit your business? (ie, lower monthly rate, increased space, ramp up production, etc.)

MISCELLANEOUS QUESTIONS

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

*Please list additional SBA loans in the Notes section

HISTORY AND DESCRIPTION OF BUSINESS

<p>Company Name</p>	
<p>Describe the history of the business: How did it start? How has it grown?</p>	
<p>Describe the primary products and services of the business</p>	
<p>Management: Please explain management structure and roles</p>	
<p>List key customers</p>	<p>List major competitors</p>

COVID IMPACT

Please describe how COVID-19 has affected your business (for better or worse.) Please include any adjustments the company has had to make due to COVID.

NOTES

Provide any notes or further explanations

IMPORTANT INFORMATION ABOUT IDENTIFICATION PROCEDURE FOR PROCESSING A 504 LOAN

To help the government fight the funding of terrorism and money laundering activities, Federal law requires Certified Development Companies to obtain, verify, and record information that identifies each person who applies for a 504 loan.

What this means for you: When you apply for a 504 loan, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver’s license or other identifying documents.

AUTHORIZATION TO RELEASE INFORMATION

I/We hereby authorize any financial corporations, insurance companies, investors, credit bureaus, the U.S. Small Business Administration, employers, banks, etc., to release any and/or all information on my/our records and/or accounts to Mountain West Small Business Finance at its request.

I/We also authorize any information to be released by my/our original or photocopied signature.

I/We hereby certify that the enclosed information, including any attachments or exhibits provided here within or at a later date, is valid and correct to the best of my/our knowledge.

By: _____

Date: _____, 20____

Printed Name

By: _____

Date: _____, 20____

Printed Name

By: _____

Date: _____, 20____

Printed Name

Equal Credit Opportunity Act and Fair Credit Reporting Act

If we take adverse action on your application for credit, you have the right to a statement of specific reasons as to why we took such adverse action within 30 days if you request the statement within 60 days of our notification. You may contact John D. Evans, President, at 2595 East 3300 South, Salt Lake City, Utah, 84109; Phone: 801-474-3232, to obtain a statement of reasons. The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided the applicant has the capacity to enter into a binding contract); because all or part of the applicant’s income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The Associate Deputy Administrator for Capital Access, United States Small Business Administration, 409 Third Street, SW, 8th Floor, Washington, DC 20416 administers Mountain West’s compliance with the Equal Credit Opportunity Act.