



**Company Information**

Company Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Principal in charge \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Secondary contact person \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 (IN-HOUSE CONTROLLER OR BOOKKEEPER) email \_\_\_\_\_

Type of business \_\_\_\_\_ Date established \_\_\_\_\_

Number of Employees: \_\_\_\_\_ Existing \_\_\_\_\_ After this Loan

Type of entity (check one)      Proprietorship      Partnership  
    Corporation              LLC

**Company Ownership**

Name _____	Title _____	% of Ownership _____
Name _____	Title _____	% of Ownership _____
Name _____	Title _____	% of Ownership _____
Name _____	Title _____	% of Ownership _____
Name _____	Title _____	% of Ownership _____
Name _____	Title _____	% of Ownership _____

If a corporation, please indicate who is President and Secretary

**Affiliate Businesses**      IF APPLICABLE

Name _____	Owner _____	% of Ownership _____
Name _____	Owner _____	% of Ownership _____
Name _____	Owner _____	% of Ownership _____

**Existing Business Location(s)**

Address _____	Square feet _____	Lease payment _____	Lease expiration _____
	Replaced by new facility? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Address _____	Square feet _____	Lease payment _____	Lease expiration _____
	Replaced by new facility? <input type="checkbox"/> Yes <input type="checkbox"/> No		

**References**

Bank Contact \_\_\_\_\_ Name & Phone: \_\_\_\_\_ / \_\_\_\_\_

Accountant \_\_\_\_\_ Firm name \_\_\_\_\_ Phone \_\_\_\_\_

Attorney \_\_\_\_\_ Firm name \_\_\_\_\_ Phone \_\_\_\_\_

Broker \_\_\_\_\_ Firm name \_\_\_\_\_ Phone \_\_\_\_\_

**Nature of Your Business**

Nature of your business \_\_\_\_\_

Type of products or services (include any catalogs or brochures) \_\_\_\_\_

Geographic market area \_\_\_\_\_

List key customers \_\_\_\_\_

List major competitors \_\_\_\_\_

**Project Information**

Street address of project \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

What is the square footage of the new building? \_\_\_\_\_ What is the square footage your company will occupy?\*

**\*Please note – we require your company to occupy 51% of an existing building and 60% of a new building, initially.**

Escrow closing date \_\_\_\_\_ Realtor's name \_\_\_\_\_ Phone \_\_\_\_\_

If known, how will the property be vested (i.e. individually, husband and wife, partnership, LLC, corporation, trust, etc.) \_\_\_\_\_

Please provide appropriate documentation (i.e. Partnership Agreement, LLC documents, Articles of Incorporation, Trust Agreement ...)

**Total Project Costs**

**Purchase existing building**

Purchase price \$ \_\_\_\_\_

Tenant improvements \$ \_\_\_\_\_

Equipment \* \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

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

**Construction project**

Land Acquisition \$ \_\_\_\_\_

Construction Bid \$ \_\_\_\_\_

Architects, permits, other Soft Costs \$ \_\_\_\_\_

Equipment \* \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

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

\*Please note – equipment to be financed must have a useful life of 10 years or greater.

If there are any tenants that will remain in the building, please provide the following information: *Also, please have your realtor provide copies of all existing leases.*

Tenant name	Square footage	Lease expiration	Rent amount

**Personal Resumé Form** TO BE COMPLETED BY EACH PRINCIPAL INVOLVED IN THE LOAN. PLEASE MAKE COPIES AS NEEDED FOR EACH INDIVIDUAL

Name \_\_\_\_\_  
FIRST MIDDLE MAIDEN LAST

Date of birth \_\_\_\_\_ Place of birth \_\_\_\_\_ Race \_\_\_\_\_ Social Security No. \_\_\_\_\_

U.S. Citizen Yes No If not, please provide alien registration number \_\_\_\_\_

Home address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

From \_\_\_\_\_ To Present \_\_\_\_\_ Home phone \_\_\_\_\_ Business phone \_\_\_\_\_

Immediate past address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

From \_\_\_\_\_ To \_\_\_\_\_

Are you employed by the U.S. Government? \_\_\_\_\_ If so, give the name of the agency and position \_\_\_\_\_

Spouse's Name \_\_\_\_\_  
FIRST MIDDLE MAIDEN LAST

Date of birth \_\_\_\_\_ Place of birth \_\_\_\_\_ Race \_\_\_\_\_ Social Security No. \_\_\_\_\_

U.S. Citizen Yes No If not, please provide alien registration number \_\_\_\_\_

**Personal information**

*Be sure to answer the next three questions correctly because they are important. The fact that you have an arrest or conviction record will not necessarily disqualify you; an incorrect answer will probably cause your application to be turned down.*

Are you presently under indictment, on parole or probation? Yes No

Have you ever been charged with and/or arrested for any criminal offense other than a minor vehicle violation? Include offenses which have been dismissed, discharged, or not prosecuted. (All arrests and charges must be disclosed and explained on an attached sheet) Yes No

Have you ever been convicted, placed on pretrial diversion, or placed on any form of probation, including adjudication, withheld pending probation, for any criminal offense other than a minor motor vehicle violation? Yes No

***If yes, to any of the above, furnish details in a separate exhibit. List name(s) under which held.***

**Miscellaneous questions**

Have you or any officer of your company ever been involved in bankruptcy or insolvency proceedings? Yes No

Are you or your business involved in any pending or prior lawsuits? Yes No *If yes, please provide details on a separate sheet.*

Have you ever received an SBA loan? Yes No *If yes, please provide a copy of the SBA Loan Authorization Document and the following:*

Original Amount \_\_\_\_\_ Date of the loan \_\_\_\_\_

Current Balance \_\_\_\_\_ Status \_\_\_\_\_

**Military service background**

Branch \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_

Rank at discharge \_\_\_\_\_ Honorable? \_\_\_\_\_

Job description \_\_\_\_\_

**Work experience**

*List chronologically, beginning with present employment*

Name of company \_\_\_\_\_ % of business owned \_\_\_\_\_  
Full address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
From \_\_\_\_\_ To \_\_\_\_\_ Title \_\_\_\_\_ Duties \_\_\_\_\_

Name of company \_\_\_\_\_ % of business owned \_\_\_\_\_  
Full address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
From \_\_\_\_\_ To \_\_\_\_\_ Title \_\_\_\_\_ Duties \_\_\_\_\_

Name of company \_\_\_\_\_ % of business owned \_\_\_\_\_  
Full address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
From \_\_\_\_\_ To \_\_\_\_\_ Title \_\_\_\_\_ Duties \_\_\_\_\_

**Education (College or Technical Training)**

Name and Location	Dates Attended	Major	Degree or Certificate
1. _____ Comments _____	_____	_____	_____
2. _____ Comments _____	_____	_____	_____
3. _____ Comments _____	_____	_____	_____

**Credit Report Authorization**

I declare that the information provided in this application is true and correct. I hereby authorize the release of any and all credit report and other information required in the processing of my loan application and as required in the servicing and/or during the term of my loan. I further authorize Alloy Development Co., to release such information to any entity as required in the processing of my loan application.

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.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_

