

FINANCING APPLICATION

Referring Broker/Affiliate (if applicable) _____ Phone: _____

Email: _____ Fax: _____

TELL US ABOUT YOUR REQUEST

Ref Code: _____

Amount Requested \$ _____ Minimum Amount Needed \$ _____

Describe the Type of Loan Reason for your Loan Request (Be specific)

Use of Funds (1) _____ \$ _____
(2) _____ \$ _____
(3) _____ \$ _____
(4) _____ \$ _____

GENERAL BUSINESS INFORMATION

Legal Business Name _____ Tax ID Number _____

Tel _____ Fax _____ Alternate Contact # _____

Street _____ City _____

State _____ Zip _____ Website Address _____

Total Assets \$ _____ Total Liabilities \$ _____ Net Worth \$ _____

Nature of the Business _____

Month/Year Established _____ / _____ Number of Employees _____ Dunn & Bradstreet # _____

Revenues Gross: 2008 \$ _____ 2009 \$ _____ Year to Date-2010 \$ _____ (thru _____ /month)

Net: 2008 \$ _____ 2009 \$ _____ Year to Date-2010 \$ _____ (thru _____ /month)

**Provide taxes and financials if available via fax.*

Sole Proprietorship _____, Partnership _____, C-Corp _____, Sub-S Corp _____, LLC Corp _____, Other _____

APPLICANT INFORMATION

Last Name _____ First _____ MI _____

Home & Cell Phone _____ Email Address _____

Home Address _____ City _____

State _____ Zip _____ Social Security Number _____ - _____ - _____ Date Of Birth _____ - _____ - _____

Title with above Company _____ % Ownership in above Company _____

Total Household Income (yearly) \$ _____ Total Assets \$ _____ Total Liabilities \$ _____

CO-APPLICANT INFORMATION

Last Name _____ First _____ MI _____

Home & Cell Phone _____ Email Address _____

Home Address _____ City _____

State _____ Zip _____ Social Security Number _____ - _____ - _____ Date Of Birth _____ - _____ - _____

Title with above Company _____ % Ownership in above Company _____

Total Household Income (yearly) \$ _____ Total Assets \$ _____ Total Liabilities \$ _____

BANKING AND ACCOUNT INFORMATION

#1 Bank/Institution _____ Account # _____

Type of Account: ___ *Checking* ___ *Savings* ___ *Other* Average Account Balance \$ _____ (prefer 4 figures)

Contact Name _____ Phone #: _____ Fax #: _____

Date Opened: _____ NSF's _____ Current Balance: _____ Signer: _____

#2 Bank/Institution _____ Account # _____

Type of Account: ___ *Checking* ___ *Savings* ___ *Other* Average Account Balance \$ _____ (prefer 4 figures)

Contact Name _____ Phone #: _____ Fax #: _____

Date Opened: _____ NSF's _____ Current Balance: _____ Signer: _____

ASSET & ADDITIONAL INFORMATION

Real Estate Owned

Value of Residential Real Estate Owned \$ _____ Mortgage Balance(s) \$ _____

Description of Residential Real Estate & Address: _____

Value of Commercial Real Estate Owned \$ _____ Mortgage Balance \$ _____

Description of Commercial Real Estate & Address: _____

Mortgage/Land Lord Information

Mortgage/Landlord Holder Name _____ Phone # _____ Fax # _____

How many years remain on Lease? _____ How many years remain on Note? _____ Mortgage Balance _____

Business Equipment Owned (Free and Clear)

Office Equipment & Furnishings \$ _____ (*Computers, Telephones, POS Systems, Copiers, Furniture, etc*)

Industrial and Manufacturing Equipment \$ _____

Construction and Farm Equipment \$ _____ (*Yellow Iron-Tractors, Loaders, Dozers, Generators,..etc*)

Medical and Dental Equipment \$ _____ Other \$ _____ Describe _____

Equipment Purchases

Do you plan to purchase equipment? *Yes or No* If yes, type: _____

Vendor Name: _____ Vendor Phone #: _____ Contact: _____

Receivables & Purchase Orders

Total receivables \$ _____ Avg. Inv. Size \$ _____ # of Accts. _____ Mo. Sales Vol. _____

Total Receivables Current \$ _____ 30-60 DAYS _____ 60-90 DAYS _____ Over 90 _____

Are you factoring now or have you factored before? *Yes or No* If yes, who: _____

Purchase Orders \$ _____ Avg. PO Size \$ _____ # of Accts _____

Have you received PO financing previously or now? *Yes or No* If yes, who: _____

Merchant Account

Average monthly sales from Visa/MC \$ _____ Processor: _____ Terminal Type: _____

How Processed: % Card Swiped: _____ % Manually Keyed w/Imprints: _____ % w/out Imprint:: _____

% Phone/Mail Order:: _____ % Internet:: _____

Married _____ Single _____ Separated _____ Divorced _____

TRADE REFERENCE(S) (*the longer the trade reference has been open the better and will be verified).

1. Company Name _____ Account # _____ Phone Number _____ Fax Number _____
Open Date _____ Signer(s) _____ Satisfactory? _____ High Credit _____ Current Balance _____ Contact Name _____

2. Company Name _____ Account # _____ Phone Number _____ Fax Number _____
Open Date _____ Signer(s) _____ Satisfactory? _____ High Credit _____ Current Balance _____ Contact Name _____

3. Company Name _____ Account # _____ Phone Number _____ Fax Number _____
Open Date _____ Signer(s) _____ Satisfactory? _____ High Credit _____ Current Balance _____ Contact Name _____

CREDIT EVALUATION

Rate your Personal Credit on a scale of 1-10 Poor 1— 2— 3— 4— 5— 6— 7— 8— 9— 10 Excellent (*Circle one*)

Do you know your personal credit score? Yes or No If so, what are Score(s)? _____

Rate your Business Credit on a scale of 1-10 Poor 1— 2— 3— 4— 5— 6— 7— 8— 9— 10 Excellent (*Circle one*)

Do you know if you have a D & B Business Credit File? Yes or No Do you know your D & B Paydex Score? _____

MISCELLANEOUS INFORMATION

Do you have any federal & state taxes past due? Yes or No If yes, how much: Federal \$ _____ State \$ _____

Are you currently under the protection of the United States Bankruptcy Laws? Yes or No

Have you been turned down previously: (*This information is critical in determining what issues that need to be overcome*).

By whom and Reason(s): _____

Are you currently working with any lender, consultant or broker on this transaction? Yes or No

If yes, who: _____

AGREEMENT

I/We completed an application containing various information and certify that all of the information is true and complete. I/We further hold FUNDING EDGE and/or its assigns harmless of any misrepresentation on the *Business Financing Application* and/or other documents provided. I/We hereby authorize FUNDING EDGE and/or its assigns to investigate my credit worthiness and verify any information provided on my/our application and other related documents.

Business Name

Signature Printed Name Title Date

Signature Printed Name Title Date

AUTHORIZATION TO OBTAIN CREDIT INFORMATION

I / We represent and warrant that the information provided in this credit application is complete, accurate and true. Each individual signing below also requests and authorizes any lenders or funding source which may be utilized (collectively referred to as "Lenders") to obtain information from the references listed above and obtain commercial and/or consumer credit histories that will be ongoing and relate not only to the evaluation of the business credit requested, but also for purposes of reviewing the account, increasing the credit line on the account (if applicable), taking collection action on the account, and for any other legitimate purpose associated with the account as may be needed.

[A facsimile, electronic or other copy of this signed authorization shall be as valid as the original.](#)

X

Applicant's Signature

Applicant's Printed Name

Date

X

Applicant's Signature

Applicant's Printed Name

Date

X

Applicant's Signature

Applicant's Printed Name

Date

ADDITIONAL DOCUMENTATION

The following documentation **'IS Needed'** to process your application:

1. **Two Forms of Identification – Enlarged**
2. **Copy of a Voided Company Check**

*The Above Information is to be sure we have proper identities and protects all parties involved.

*We do keep your file for one year and any information after that is shredded for your protection.

***Fax the above Information and Application to
FundingEdge at 210-249-0211.***

*The following **“MIGHT BE” Needed** to process your application. Should we need any of the following we will advise after receipt of initial application unless directed otherwise.*

1. **Business Report *Fundingedge typically obtains**
2. **Vendor Invoice for Equipment Purchases *if available**
3. **2 yrs Business Tax Returns**
4. **Yr-to-date Business Financials**
5. **2 yrs Personal Tax Returns *case-by-case**
6. **Merchant Statements – 6 months – all pages**
7. **Bank Statements – 2-6 months – all pages**
8. **Personal Financial Statement *we would provide specific form**
9. **Equipment List**