

FRANCHISE FINANCE

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Tracking # _____
(internal use only)

Reference/Franchisor Contact _____

Please Underline As Appropriate (type in answers, save and email back)

- Resale
- Start Up
- Conversion

Today's Date _____

SBA APPLICATION PRE SCREEN ONLY 3-31-14

Name _____ Franchise _____
 Address _____ City _____ State _____ Zip _____
 Work Phone _____ Home Phone _____ Cell Phone _____
 E-Mail _____

*Do you own any franchises now? _____ Name _____ How many _____ How Long _____

*What is your best guess of your credit score? _____

What do you do now and what business experience do you or spouse have:

Have you applied for a loan anywhere in the last 120 days? Yes ___ No ___

If yes, where/why/status: _____

NEW PROJECT COST

Franchise Fee _____

Leasehold Improvements(inside) _____

Machinery & Equipment _____

Furniture & Fixtures & Signs _____

Inventory _____

Closing Cost (5-6% total) _____

Business Resale Price (If a resale) _____ (how long been open?) _____ Why are they selling it? _____

Working Capital _____ (how far from where you live? _____ (need last P/L)

TOTAL PROJECT COST \$ _____

LOAN REQUEST \$ _____ Min % liquid cash required? (max usually 50-60%) _____

PERSONAL FINANCIAL STATEMENT

Name _____ Position of Occupation _____ Date _____

Type in answers then save and email back (If married combine on one form)

ASSETS IN EVEN DOLLARS	LIABILITIES IN EVEN DOLLARS
<p><u>Cash</u></p> <p> Checking \$ _____</p> <p> Savings \$ _____</p> <p> Mutual Funds \$ _____</p> <p>Life Insurance</p> <p> Cash value only \$ _____</p> <p>Marketable Securities</p> <p> Stocks \$ _____</p> <p> Bonds \$ _____</p> <p><u>IRA's</u></p> <p> <u>Total</u> \$ _____</p> <p><u>401k</u></p> <p> <u>Total</u> \$ _____</p> <p> Is 401k accessible? <input type="checkbox"/> No <input type="checkbox"/> Yes</p> <p><u>Non-Market Securities</u></p> <p> <u>Total</u> \$ _____</p> <p><u>Real Estate Owned</u></p> <p> <u>Total</u> \$ _____</p> <p><u>Personal Property</u> \$ _____</p> <p><u>Other Assets:</u> _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>TOTAL ASSETS \$ _____</p> <p><u>ANNUAL SOURCES OF INCOME</u></p> <p>Salary, bonus, commission \$ _____</p> <p>Dividends \$ _____</p> <p><u>Real Estate Income</u> \$ _____</p> <p>Other Income \$ _____</p> <p><u>TOTAL</u> \$ _____</p>	<p>Notes Payable to banks \$ _____</p> <p>Unpaid Income Tax \$ _____</p> <p>Real Estate mortgages Remaining Amount \$ _____</p> <p>Loans on Insurance \$ _____</p> <p>Loans on 401k \$ _____</p> <p>Credit card Debt now..... \$ _____ Remaining still Available () _____</p> <p>Other Debts \$ _____</p> <p>TOTAL LIABILITIES \$ _____</p> <p>NET WORTH \$ _____</p> <p>PERSONAL AND GENERAL INFORMATION</p> <p>Are you a U.S. citizen? _____ Green Card? _____</p> <p>If available, how many inquiries have you had on your Credit report in the last 6 mo _____ 12 mo _____</p> <p>Have you served in the military? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, which branch? _____</p> <p>Are you obligated to pay alimony, child support, or Maintenance payments? _____</p> <p>Social Security # _____ Spouse # _____</p> <p>Are any assets pledged? Yes _____ No _____</p> <p>Are you a defendant in any suits or legal actions? Yes _____ No _____</p> <p>Have you ever taken bankruptcy? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If Yes, Explain: _____</p> <p>_____</p>