

# **Application Forms**

## **Self Storage**

### **Mini Warehouses**

### **Large Warehouse**

### **Attached Detached**





**Self storage or Warehouse property Purchase or Refinance**  
**Commercial Loans**

Check List of required information to complete business loan proposal.

Project Name \_\_\_\_\_

Borrower Name \_\_\_\_\_

Borrower Address \_\_\_\_\_

Phone \_\_\_\_\_ Cell \_\_\_\_\_ Fax \_\_\_\_\_

Date Received \_\_\_\_\_

**Personal information**

- \_\_\_\_\_ Signed 1003, officers owning more than 20% of the company
- \_\_\_\_\_ Copy of, S.S.,D.L., Resident Card or Citizen proof.
- \_\_\_\_\_ Credit report authorization by borrower's.
- \_\_\_\_\_ Personal financial statement dated within 30 days (no 1003)
- \_\_\_\_\_ Current year personal bank Accounts.
- \_\_\_\_\_ Last three years of personal income tax.
- \_\_\_\_\_ Assets documents support.
- \_\_\_\_\_ Current personal financial statement (30 days) for each partner stockholder and or officer owning more than 20% of the company.
- \_\_\_\_\_ Last 3 years personal income tax, on all 20% + owners
- \_\_\_\_\_ Three last months personal bank statements.
- \_\_\_\_\_ Financial statement of any affiliate business owned, operated, or 50% or more controlled by principals of this business.

**Business & property information**

- \_\_\_\_\_ Copy of corporate charter, articles & by law, assumed name.
- \_\_\_\_\_ Copy of business license.
- \_\_\_\_\_ Description / History of the company.
- \_\_\_\_\_ Resumes on key management.
- \_\_\_\_\_ Last three years business Income Tax
- \_\_\_\_\_ Current year of business profit and loss, dated within 30 days.
- \_\_\_\_\_ Current financial statement.
- \_\_\_\_\_ Current year business bank statements.
- \_\_\_\_\_ Schedule of account receivables, balancing to current statement.
- \_\_\_\_\_ Schedule of accounts payable, balancing to current statement.
- \_\_\_\_\_ Copy of deed, trust, or warranty deed.( refinancing)
- \_\_\_\_\_ Copy of the note.( refinancing)
- \_\_\_\_\_ Copy of the buy or sell agreement.( purchase)
- \_\_\_\_\_ Insurance, tax, and association information.
- \_\_\_\_\_ Appraisal of Real Estate, ( older )
- \_\_\_\_\_ Purpose and benefit of the loan, and use of the loan proceeds.
- \_\_\_\_\_ Actual photo's of the property.
- \_\_\_\_\_ Rent roll.
- \_\_\_\_\_ Actual expenses.
- \_\_\_\_\_ Owner occupied space, and operation details.
- \_\_\_\_\_ Projected use, project and conversion explanations.

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Rep. Signature