

FINANCE QUESTIONNAIRE

This confidential questionnaire is designed to help us quickly assess your business and your equipment financing request. Supplying this information allows us to submit your credit request and will also maximize your approval success.
This questionnaire must be completed in FULL.

BUSINESS ASSESSMENT

Business Name			
Office Address			
City	State	Zip	County
Principal/Contact Name		How Many Owners?	
Office Phone	Ext	Cell Phone	Fax
Contact Email Address			
Website URL			
Entity Legal Structure		Date Established Under Current Ownership	
How would you describe your services? B2B B2C Both			
Industry	Annual Gross Revenue		Total No. Employees (W-2)
Do you have a bookkeeper on staff?	Y	N	# Full Time # Part Time
Do you have a CPA firm that completes your tax returns?	Y	N	# Independent Contractors

CORPORATE CREDIT OVERVIEW

Corporate Credit Profile (best of your knowledge)			
Total payroll of the business?		DUNS Number:	
Current on Debts	Y	N	If not, how much is past due? \$
Do you have Credit Lines?	Y	N	AR Finance? Y N If yes on either, what are the terms?
Has Company filed Bankruptcy	Y	N	Date Filed
Are there any tax liens?	Y	N	Amount: \$ Have they been released? Y N
Does Company have any judgments?	Y	N	Amount: \$ Have they been paid? Y N
Does Company have any pending contingency obligations? Y N Est. Liability (\$)?			
Describe Credit History (explain problems):			
What is your motivation for acquiring this financing request?			