

COMMERCIAL LOAN QUESTIONNAIRE

How long have you been in business? Months _____ Years _____

Type of business: Product _____ Service _____

What is your corporate structure? _____

Owner(s) business background _____

Management background experience: Months _____ Years _____

Marketing staff experience: Months _____ Years _____

Sales staff experience? Months _____ Years _____

How will you attract customers to your business? _____

What is your market niche? _____

Who are you customers? _____

Who are your competitors? _____

Name _____

Name _____

Name _____

What are your competitors' advantages? _____

Can you produce your last three years tax returns? Yes _____ No _____

What are your projected sales for the next 5-10 years \$ _____

Expected growth ____% within _____ 3 years ____ 5 years ____ 10 years _____

How much of your personal money is in the business \$ _____

List borrower(s)/guarantor(s) names and phone numbers:

Name _____

Phone _____

Name _____

Phone _____

Who else has put money into the business? _____

Name _____

Phone _____

What is the purpose of this funding? _____

Owner(s) credit rating: 580+ _____ 650+ _____ 700+ _____ 780+ _____ 800+ _____

Repayments on this loan will be made:

Weekly _____ Monthly _____ Quarterly _____ Yearly _____

Within first 3 months _____ After 6 month _____ End of first year _____

What type of collateral can you pledge? _____

Current bank information:

Name of Bank _____

Phone _____

Contact _____

Name of Bank _____

Phone _____

Contact _____

Open loans? Yes _____ No _____ Amount open \$ _____

Are you current with these loans? Yes _____ No _____

If no, please explain _____

Tax Liens Yes: _____ No _____ Date _____

Judgments: Yes _____ No _____ Date _____

Foreclosures: Yes _____ No _____ Date _____

Bankruptcies: Yes _____ No _____ Date _____

Current loan rate: _____% Repayment period _____

What is your gross margin for goods sold _____%

Who wrote your marketing plan?

Name _____

Phone _____

Name _____

Phone _____

Name _____

Phone _____

Name _____

Phone _____

Can you replace top management people if needed? Yes _____ No _____

Name _____

Phone _____

Name _____

Phone _____

Name _____

Phone _____

How would the business continue if something happened to you? Please explain:

What do you want to accomplish with your business within the next 5-10 years?

Business name: _____

Address: _____

Phone _____

Contact person _____

Mobile # _____

Email _____

PLEASE PRINT AND EMAIL TO: don@ibrresearch.com

(941) 681-5484

Please retain a copy of this agreement for your files.

The above questions have been designed to assist underwriters and all persons involved with additional information for your loan request. Please be sure your answers are clear and precise.

To insure proper handling of your project all information sent will be held in complete privacy and not released without your written consent.