



BUSINESS PROSPECT INFORMATION FORM

Date:	Credit Union:	CU Contact:	
Business Name:		Business Contact:	
Address:		City:	Zip:
Phone:	Cell:	Fax:	Email:

1. Nature of business?

2. What do you plan to use the money for? (please describe)

- buy assets
- replace other loans
- replace equity
- working capital to create new sales
- other

3. How much money do you need?

4. Collateral?

5. How will the money be repaid?

6. Current business loans?

7. How do you feel transaction should be done? (rate, terms, amortization ... etc.)

8. Notes

Items Needed to Review Business Loan Request

- Last 3 years Personal and Business Tax Returns
- Current Profit & Loss Statement and Balance Sheet
- Personal Financial Statement
- Business Plan (if new business)