

## EQUIPMENT LEASE/PURCHASE 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 to the appropriate lender(s) which will maximize your approval and funding 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

### CREDIT OVERVIEW

Personal Credit Profile (best of your knowledge)			
Do you take a salary from the business?	Y	N	Salary Range:
Are you current on Debt(s)?	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?
Have you filed bankruptcy?	Y	N	Date Filed
Do you have any tax liens?	Y	N	Amount: \$      Have they been released?    Y    N
Do you have any judgments?	Y	N	Amount: \$      Have they been paid?      Y    N
If you are a new business, how much capital will it take to start your business? \$			
Of the TOTAL dollars required to start your business, how much is cash (\$      ) and how much is borrowed money (\$      )?			
Describe your Credit History (explain problems):			
What is your motivation for acquiring this equipment?			

## BUSINESS BANKING INFORMATION

Bank Name	Phone #	Contact Name
Have you borrowed from this bank before?	Yes	No
If yes, what was the loan amount? \$	What is the current balance? \$	

## EQUIPMENT OVERVIEW

Type of Equipment:	Equipment Model:				
Is this equipment for an:	Existing Location	New Location			
Purpose of Equipment:	Expansion			Replacement	
Purchase Price: \$	Preferred Lease Terms (months):	12	18	24	30 36
Is your equipment being acquired from a manufacturer, dealer or a private party?	(Drop Box)				
Do you have a detailed product description and quote from a dealer/vendor?	Y	N			
Will this equipment generate revenue for your business?	Y	N		How much? \$	
Have you leased/financed equipment in the past?	Y	N		Amt. of money for down payment or security deposit? \$	
Requested Delivery Date	If necessary, do you have other assets to pledge as collateral?				Y N
	Type:	Real Estate	Titled Vehicles	Other:	
	Estimated Value of Collateral: \$				

## COMMENTS

Please provide relevant information such as your industry experience, how this equipment will improve your business or other specific comments that will help us understand you and your business.

## REQUIRED DOCUMENTS

In addition to this questionnaire, please provide the following required items.

- Personal Financial Statement for all principals
- Last year's 2 Personal Tax Return for all principals
- Last year's 2 Business Tax Return
- Current income statement & balance sheet for your business
- Your last 3 months company bank statements
- New businesses are required to have an outside source of income.**

1) Please check the outside income category that applies to you:

Working Spouse                      Other Business Income  
 Retirement Income                Real Estate Income  
 Other \_\_\_\_\_

2) Annually, how much is your outside source of income? \$ \_\_\_\_\_

\_\_\_\_\_  
 Print Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Date