

**Important Applicant Information:** Federal law requires financial institutions to obtain sufficient information to verify your identity. You may be asked several questions and to provide one or more forms of identification to fulfill this requirement. In some instances we may use outside sources to confirm the information. The information you provide is protected by our privacy policy and federal law.

## Business Loan QuickApp Checklist

**NOTE:** Additional information may be required by lender to complete the due diligence process.

In order for us to properly evaluate your credit request quickly & provide you with the most attractive possible pricing & structure, please submit a complete application package, including

- Completed Business Loan Application (including owner's Personal Financial Statement)
- Business Checking Account Summary Page  Owner's Most Recent Personal Tax Return
- Last 3 Years Business Financial Statements or Tax Returns
- Financial Projections for new locations, acquisitions or major remodels

**Please submit your completed loan application package to:**

ATTN: Corporate Banking Group  
National Cooperative Bank  
2011 Crystal Drive, Suite 800  
Arlington, VA 22202

## Business Profile

Business Legal Name (As it appears on Federal Tax Return)		Doing Business As (If different from legal name)		Federal Tax ID Number	
Business Street Address		City	County	State	Zip
Primary Contact Name		Business Phone	Business Fax	Email Address	
State of Incorporation		Date Business Established		Date Current Ownership Established	
Brand Concept(s)		Years in Business		Number of Locations Owned	
<b>Ownership Structure:</b> <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> C Corp <input type="checkbox"/> S Corp <input type="checkbox"/> Limited Liability Partnership <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Limited/General Partnership					
<b>Is Business Applicant a Party to a claim or lawsuit?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO <b>Has Business Applicant or Principal(s) ever filed for bankruptcy?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO					
<b>Has Business Applicant or Principal(s) ever defaulted on a credit obligation?</b> <input type="checkbox"/> YES <input type="checkbox"/> NO					
<b>PROJECT TYPE:</b> <input type="checkbox"/> Acquisition <input type="checkbox"/> New Location Dev. <input type="checkbox"/> Remodel/Renovation <input type="checkbox"/> Equip. Pkg. <input type="checkbox"/> Real Estate <input type="checkbox"/> Refinance of Existing Debt <input type="checkbox"/> Other Project: _____					

## Ownership Profile

<b>PRINCIPAL #1:</b> Legal Name (First Middle Last)		Title	SSN	Date of Birth	% of Ownership	Monthly Housing Payment
Home Street Address		City	State	Zip	Annual Income from this Co.	Other Annual Income
						<input type="checkbox"/> OWN <input type="checkbox"/> RENT
<b>PRINCIPAL #2:</b> Legal Name (First Middle Last)		Title	SSN	Date of Birth	% of Ownership	Monthly Housing Payment
Home Street Address		City	State	Zip	Annual Income from this Co.	Other Annual Income
						<input type="checkbox"/> OWN <input type="checkbox"/> RENT
<b>PRINCIPAL #3:</b> Legal Name (First Middle Last)		Title	SSN	Date of Birth	% of Ownership	Monthly Housing Payment
Home Street Address		City	State	Zip	Annual Income from this Co.	Other Annual Income
						<input type="checkbox"/> OWN <input type="checkbox"/> RENT
<b>PRINCIPAL #4:</b> Legal Name (First Middle Last)		Title	SSN	Date of Birth	% of Ownership	Monthly Housing Payment
Home Street Address		City	State	Zip	Annual Income from this Co.	Other Annual Income
						<input type="checkbox"/> OWN <input type="checkbox"/> RENT

## Project Detail (Loan Purpose Information)

Land \$ _____	Inventory \$ _____
Building \$ _____	Leasehold Improvements \$ _____
Acquisition \$ _____	Soft Costs \$ _____
Equip. Fixtures \$ _____	Working Capital \$ _____
Signage \$ _____	Refinance \$ _____
<b>TOTAL PROJECT COSTS</b> \$ <input style="width: 150px;" type="text"/>	

## Source of Project Funds (Please list amount & source)

Borrower's Cash Investment	\$ _____
Other (Please Describe)	_____
Other (Please Describe)	_____
<b>Total Investment Sources (B)</b>	\$ <input style="width: 100px;" type="text"/>
Total Project Costs (A)	\$ <input style="width: 100px;" type="text"/>
- Total Investment Sources (B)	\$ <input style="width: 100px;" type="text"/>
<b>= TOTAL FINANCING NEEDED (A - B)</b>	\$ <input style="width: 100px;" type="text"/>

# Business Debt Schedule

LOAN #	LENDER	ORIG. AMT.	CURR. BAL.	MONTHLY PMT.	INT. RATE	MATURITY DATE	SECURED?	COLLATERAL

## Signatures and Authorization

**Agreement:** The undersigned applicant(s) do hereby represent and warrant that the information contained on this form, and in the attachments submitted in conjunction with this application, is complete and correct. Furthermore, the applicant(s) authorize National Cooperative Bank, and/or any subsidiaries or affiliates, to obtain credit references and credit reports on the business and its principals, and to release credit information to others. All applications are subject to final credit approval.

### PRINCIPAL #1

\_\_\_\_\_  
**Print Applicants Name**                      **Title**                      **Applicants Authorized Signature**                      **Date**

### PRINCIPAL #2

\_\_\_\_\_  
**Print Applicants Name**                      **Title**                      **Applicants Authorized Signature**                      **Date**

### PRINCIPAL #3

\_\_\_\_\_  
**Print Applicants Name**                      **Title**                      **Applicants Authorized Signature**                      **Date**

### PRINCIPAL #4

\_\_\_\_\_  
**Print Applicants Name**                      **Title**                      **Applicants Authorized Signature**                      **Date**