



Required Document Checklist for Loan Requests More Than \$100,000

Please complete your application and documents before your appointment. Include this completed checklist with your application. To submit your application electronically, please contact us for a secure link.

For The Business:

- ☐ Last 3 years tax returns
- ☐ Current financial statements if more than 5 months since last fiscal year-end
- ☐ Business plan if the business is a start-up
- ☐ Schedule of loans/debts on OUCU form
- ☐ Bank account statements for business (last 60 days for non-OUCU accounts)

For Each Owner:

- ☐ Last 3 years of personal tax returns
- ☐ W-2s for last 3 years
- ☐ 3 most recent paystubs showing name, SS #, and YTD information
- ☐ Personal Financial statement on OUCU form
- ☐ Real estate schedule on OUCU form (if applicable)
- ☐ Most recent retirement and investment statements (last 60 days)
- ☐ Bank account statements for personal (last 60 days for non-OUCU accounts)
- ☐ Operating agreement
- ☐ EIN documentation
- ☐ Verification of SOS

For Real Estate:

- ☐ OUCU real estate schedule rent roll
- ☐ Copy of leases
- ☐ Copy of deed or legal description
- ☐ Purchase agreement (if applicable)

Additional Items (if):

- ☐ If construction or improvement loan – plans, specs, AIA Documentation, budget, general contractor information and signed contract
- ☐ If franchise, provide copy of UFOC, Franchise Agreement
- ☐ If Trust copies of Trust Agreement, Addendums and any changes.

All information must be signed and dated. Your application is not considered complete until we have received all REQUIRED information. Incomplete submission will not be processed. We will contact you promptly if more information is needed to process your request.

Business Services

OUCU Financial | 944 E. State St. Athens, OH 45701
740-447-5202 | Fax 740-597-2874 | business@oucu.org

BUSINESS LOAN APPLICATION																													
***** Each shareholder, partner or member owning 20 percent or more interest in the Business must sign a personal guaranty.																													
BORROWER INFORMATION																													
Business Applicant's Name (exact legal name)			DBA (if applicable)																										
Taxpayer ID Number	Year Business Established	Years Current Ownership	Years Owners have been in this line of business																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d3d3d3;"> <th>Business Type:</th> <th>INDIVIDUAL</th> <th>CORPORATION</th> <th>PARTNERSHIP</th> <th>OTHER</th> </tr> </thead> <tbody> <tr> <td></td> <td>Sole Proprietorship</td> <td>Sub S-Corporation</td> <td>General Partnership</td> <td>Nonprofit Organization</td> </tr> <tr> <td></td> <td>Individual</td> <td>C-Corporation</td> <td>Limited Partnership</td> <td>Professional Association</td> </tr> <tr> <td></td> <td></td> <td>Limited Liability Company</td> <td>Limited Liability Partnership</td> <td>Trust</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>Other</td> </tr> </tbody> </table>					Business Type:	INDIVIDUAL	CORPORATION	PARTNERSHIP	OTHER		Sole Proprietorship	Sub S-Corporation	General Partnership	Nonprofit Organization		Individual	C-Corporation	Limited Partnership	Professional Association			Limited Liability Company	Limited Liability Partnership	Trust					Other
Business Type:	INDIVIDUAL	CORPORATION	PARTNERSHIP	OTHER																									
	Sole Proprietorship	Sub S-Corporation	General Partnership	Nonprofit Organization																									
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		Limited Liability Company	Limited Liability Partnership	Trust																									
				Other																									
If "other", please provide details																													
Description of the Business or Service																													
Business Contact Name		Business Phone	Email																										
Cell Phone	Personal Email																												
BUSINESS LOCATION (cannot be a P.O. box):																													
Street Address		City	State	Zip Code																									
BUSINESS MAILING ADDRESS (if different from above):																													
Street Address		City	State	Zip Code																									
LOAN REQUEST																													
Type of Loan	Mortgage	Vehicle	Equipment	Line of credit																									
	SBA 7a/504	Construction	Other																										
If "Other", please provide details:																													
Loan Amount	Loan Purpose																												
COLLATERAL OFFERED																													
Type of Collateral: (check all that apply)	Real estate	Vehicle	Equipment	Accounts Receivable																									
		Inventory	Account #	Other																									
(Please provide more information if "Other" is indicated:)																													
Collateral Description: (Examples: property address and type, year/make/model of vehicles or equipment, etc.)																													
Collateral Value:	Collateral Owner:		Source of Value:																										

OWNERSHIP/GUARANTORS/CO-APPLICANTS INFORMATION									
List all Owners, Guarantors, and/or Co-Applicants for loan request									
If the Borrower is an entity (corporation, limited liability company, etc.), list each owner, guarantor, and/or co-applicant in the table below, along with their date of birth, social security number, and mailing address. A personal guaranty (greater than 20% ownership), will be required from each owner of the entity.									
1. Name/Title		Social Security #		DOB		% Ownership		Number of Yrs w/ Business	
Co Applicant? YES NO		Guarantor? YES NO		Mailing Address:					
2. Name/Title		Social Security #		DOB		% Ownership		Number of Yrs w/ Business	
Co Applicant? YES NO		Guarantor? YES NO		Mailing Address:					
3. Name/Title		Social Security #		DOB		% Ownership		Number of Yrs w/ Business	
Co Applicant? YES NO		Guarantor? YES NO		Mailing Address:					
4. Name/Title		Social Security #		DOB		% Ownership		Number of Yrs w/ Business	
Co Applicant? YES NO		Guarantor? YES NO		Mailing Address:					
BUSINESS DEPOSIT ACCOUNTS									
Financial Institution		Type of Account			Current Balance			Would you like to move the account to OUCU?	
								YES NO	
								YES NO	
								YES NO	
RELATED BUSINESS ISSUES									
Has the Applicant or any Guarantor or Co-applicant ever declared bankruptcy?							YES NO		
Has any Applicant, Guarantor, or Co-Applicant ever been convicted of a Felony? If yes, date of conviction and outcome: Please provide documentation.							YES NO		
Is the Business Applicant or any Guarantor or Co-applicant a party to any claim or lawsuit?							YES NO		
Are there any state or federal tax liens filed against any Business Applicant, Guarantor, or Co-applicant?							YES NO		
ACKNOWLEDGEMENT & CERTIFICATION									
This application is completed for: Business-purpose credit* in my name or that I personally guaranty. I am relying on my income and assets and, if applicable, the income and assets of the business in which I am the sole owner, as the basis for repayment. If you are applying for secured credit, what is your marital status? Married Unmarried Separated Business-purpose credit* in all of our names or that we all personally guaranty. We are relying on our joint incomes and assets and, if applicable, the business in which we are joint-owners, as the basis for repayment. *"Business-purpose credit" includes credit of any kind extended to an individual or entity for commercial purposes, including, but not limited to, credit extended to purchase, refinance or improve 1-4 unit residential rental property, multi-family rental property, commercial real estate or farm land. The undersigned acknowledge & understand that the information contained herein, along with all information submitted with this application, is provided to induce OUCU Financial ("OUCU") to extend or to continue to extend business-purpose credit to the undersigned or to others upon the guaranty of the undersigned, & OUCU is relying on said information in deciding to grant or continue credit or to accept a guaranty thereof. The undersigned represent, warrant & certify that the information provided herein & submitted with this application is true, correct & complete. The undersigned agree to notify OUCU immediately & in writing of any change in name, address, or employment & of any material adverse change in the financial condition of any of the undersigned or the ability of any of the undersigned to perform their obligations to OUCU. If the undersigned fail to notify OUCU as required above, or if any of the information herein or if any of the information submitted with this application should prove to be inaccurate or incomplete in any material respect, OUCU may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, in default & immediately due and payable. The undersigned acknowledge they have read & accepted the terms & disclosures contained herein. All parties agree & acknowledge that a copy or facsimile of this application will be as valid as the original. This application & any other financial or other information that the undersigned gives OUCU shall be the property of OUCU. The undersigned authorizes any person or consumer reporting agency to give OUCU any information it may have on the undersigned. Each of the undersigned authorizes OUCU to answer questions about its credit experience with the undersigned.									

IMPORTANT NOTICES & DISCLOSURES
IMPORTANT NOTICE. It is a Federal crime under Section 1014 of Title 18 of the United States Code for any person to knowingly make any false statement or report, or willfully overvalue any land, property or security for the purpose of influencing in any way the action of an insured State-chartered credit union & any institution the accounts of which are insured by the National Credit Union Administration. EQUAL CREDIT OPPORTUNITY ACT. The federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The federal agency that administers compliance with this law concerning this creditor is: Federal Trade Commission, Chicago Regional Office, 55 E. Monroe St., Suite 1437, Chicago, IL 60603. The Ohio laws against discrimination require that all creditors make credit equally available to all creditworthy customers and that credit reporting agencies maintain separate credit histories on each individual upon request. The Ohio civil rights commission administers compliance with this law. APPRAISAL NOTICE. We may order an appraisal to determine the property's value and charge you for this appraisal. We will promptly give you a copy of any appraisal, even if your loan does not close. You can pay for an additional appraisal for your own use at your own cost. By signing below, you acknowledge receipt of this Appraisal Notice. RIGHT TO REQUEST SPECIFIC REASON FOR CREDIT DENIAL. If your application for credit is denied, you have the right to a written statement of the specific reasons for the denial. To obtain the statement, please contact us within sixty (60) days from the date you are notified of our decision. We will send you a written statement of reasons for the denial within thirty (30) days of receiving your request for the statement. Please send requests to: OUCU Financial, 944 East State Street, Athens, Ohio 45701. ADDITIONAL NOTICE: OUCU complies with Section 326 of the Patriot Act, which requires OUCU to obtain, verify, and record information that identifies each applicant for financing. OUCU complies with the FACTAct, and other similar laws, which allow each applicant to opt out of information sharing for marketing purposes. The federal agency that administers compliance with this law concerning this creditor is: National Credit Union Administration Regional Director, Region III, Suite 1600, 7000 Central Parkway, Atlanta, Georgia 30328. DISCLOSURE AND CONSENT TO RECEIVE DOCUMENTS IN ELECTRONIC FORM. This disclosure required by this part that are required to be given in writing may be provided to the applicant in electronic form, subject to compliance with the consumer consent and other applicable provisions of the Electronic Signature in Global and National Commerce Act (E-Sign Act) (15 U.S.C. 7001 et. seq.). Where the disclosure under ss 1002.5(b)(1), 1002.5(b)(1), 1002.5(d)(1), 1002.5(d)(2), 1002.13, and 1002.14(a)(2) accompany an application accessed by the applicant in electronic form, these disclosures may be provided to the applicant in electronic form or with the application form, without regard to the consumer consent of the E-Sign Act. These Notices are intended for use in connection with applications for business credit under ss 1002.9(a)(3)

SIGNATURES		
**Signature of Applicants and Guarantors: (Each Shareholder, Partner, or Member owning 20 percent or more interest in the Business Applicant, co-applicant, and guarantor, sign below)		
1 Signature: _____	Title: _____	Date: _____
2 Signature: _____	Title: _____	Date: _____
3 Signature: _____	Title: _____	Date: _____
4 Signature: _____	Title: _____	Date: _____

To Print:

- Complete form
- Save as new file

To Email:

Please contact us to receive a secure link to submit your items.

Protecting our members' personal information is very important to us. Please never include non-public and confidential personal information in an email or attachment.

Personal Financial Statement

IMPORTANT NOTICE. The information contained in this statement is provided to OUCU Financial ("OUCU") to extend or to continue to extend business-purpose credit to the undersigned or to others upon the guaranty of the undersigned. OUCU is relying on this information in deciding to grant or continue credit or to accept a guaranty thereof. It is a Federal crime under Section 1014 of Title 18 of the United States Code for any person to knowingly make any false statement or report, or willfully overvalue any land, property or security for the purpose of influencing in any way the action of an insured State chartered credit union and any institution the accounts of which are insured by the National Credit Union Administration.

If you are applying for individual credit or if this statement relates to your guaranty of the indebtedness of other person(s), firm(s) or corporations(s) including any income you are relying on, such as alimony, child support, maintenance payments or any other income or assets. Alimony child support, or separate maintenance income, need not be revealed if you do not wish to have it considered as basis for repaying this obligation.

I intend to apply for individual credit:

Signature: _____

If you are applying for joint credit, or if this statement relates to your guaranty of the indebtedness of other person(s) firm(s) or corporation(s), complete all sections.

We intend to apply for joint credit:

Signature: _____

Co-Applicant Signature: _____

All applicants please sign and date the back of this financial statement.

Individual Information

Individual Name		
Home Address, City, State, Zip		
Social Security Number	Date of Birth	Home Phone
Cell Phone	Email	
Employer Name	Employer Address, City, State, Zip	
Business Phone	Title/Position	No. of Years

Note: Attach separate sheet(s) to explain all "Yes" answers.

1. Are any significant changes in your income or expenses expected in the next 12 months?	YES	NO
2. Are you a guarantor, co-signer or otherwise liable for any loan, lease or other contract or debt of an individual or business?	YES	NO
3. Do you or any business in which you are an owner have any past due tax obligations (including, but not limited to, property taxes, income taxes, or payroll/withholding taxes)?	YES	NO
4. Do you or any business in which you are an owner have any outstanding judgements or collections?	YES	NO
5. Do you or any business in which you are an owner have any outstanding letters of credit or surety bonds?	YES	NO
6. Have you or any business in which you are or were an owner ever declared bankruptcy including minority ownership of greater than or equal to 20%?	YES	NO
7. Are there any legal actions pending against you or any business in which you are an owner?	YES	NO
8. Are you on parole or on probation, or have you ever been convicted or placed on any form of probation, for any criminal offense other than a minor vehicle violation?	YES	NO

Joint Information

Individual Name		
Home Address, City, State, Zip		
Social Security Number	Date of Birth	Home Phone
Cell Phone	Email	
Employer Name	Employer Address, City, State, Zip	
Business Phone	Title/Position	No. of Years

Note: Attach separate sheet(s) to explain all "Yes" answers.

1. Are any significant changes in your income or expenses expected in the next 12 months?	YES	NO
2. Are you a guarantor, co-signer or otherwise liable for any loan, lease or other contract or debt of an individual or business?	YES	NO
3. Do you or any business in which you are an owner have any past due tax obligations (including, but not limited to, property taxes, income taxes, or payroll/withholding taxes)?	YES	NO
4. Do you or any business in which you are an owner have any outstanding judgements or collections?	YES	NO
5. Do you or any business in which you are an owner have any outstanding letters of credit or surety bonds?	YES	NO
6. Have you or any business in which you are or were an owner ever declared bankruptcy including minority ownership of greater than or equal to 20%?	YES	NO
7. Are there any legal actions pending against you or any business in which you are an owner?	YES	NO
8. Are you on parole or on probation, or have you ever been convicted or placed on any form of probation, for any criminal offense other than a minor vehicle violation?	YES	NO

Annual Income (omit cents)			Annual Expenses (omit cents)		
Income Description	Individual Information	Joint Information	Expense Description	Individual Information	Joint Information
Wages and salaries			Federal & state income taxes		
Bonus and commissions			Alimony or child support*		
Interest/Dividends			Other		
IRA distributions/Pensions and annuities			TOTAL EXPENSES:		
Unemployment			*Income from alimony, child support, or separate maintenance need not be revealed if you do not wish to have it considered as a basis for repaying an obligation.		
Social security					
Other*					
TOTAL INCOME:					

A: Cash In Other Financial Institutions (checking, savings, money markets, certificates of deposit, etc.)				
Type of Account	Financial Institution	Pledged?	Yes/No	Account Balance
		YES	NO	
		YES	NO	
		YES	NO	
				Total:

B: Marketable Securities (mutual funds, stocks, bonds, etc.)		C: Retirement Accounts (including IRA, 401k, 403b, Keogh, SEP, Profit-Sharing, etc.)	
Description	Market Value	Description	Market Value
	Total:		Total:

D: Vehicles, Boats, Etc.			
Year, Make, Model	Creditor Name	Market Value	Monthly Payment
		Total:	Total:

E: Real Estate Owned - Personal - Please complete Real Estate Schedule			
Date Acquired	Address	Creditor Name	Market Value
			TOTAL:

F: Business/Partnership Interests - Please attach K-1, if applicable			
Name of Business/Partnership	Owner Since	Total Debt	%Owned
			%
			%
			%
		TOTAL:	
G: Credit Cards, Department Store Cards, Charge Cards, Etc.			
Creditor Name	Credit Limit	Current Balance	Monthly Payment
	TOTAL:	TOTAL:	TOTAL:
H: Other Liabilities (student loans, family loans, etc.)			
Creditor Name	Type of Loan	Current Balance	Monthly Payment
		TOTAL:	TOTAL:
IMPORTANT NOTICES & DISCLOSURES			
YOUR REPRESENTATIONS. The undersigned represent, warrant and certify that the information provided herein is true, correct and complete. The undersigned agree to notify OUCU immediately and in writing of any change in name, address, or employment and of any material adverse change in (1) any of the information contained in this statement, (2) the financial condition of any of the undersigned, or (3) the ability of any of the undersigned to perform their obligations to OUCU. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. If the undersigned fail to notify OUCU as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, OUCU may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, in default and immediately due and payable. OUCU is authorized to make all inquiries it deems necessary to verify the accuracy of the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorize any person or consumer reporting agency to give OUCU any information it may have on the undersigned. Each of the undersigned authorizes OUCU to answer questions about its credit experience with the undersigned. As long as any obligation or guaranty of the undersigned to OUCU is outstanding, the undersigned shall supply annually an updated financial statement and any other financial information requested by OUCU. The undersigned acknowledge receiving a copy of the disclosures herein. All parties will consider a copy or facsimile of this statement to be as binding and valid as the original. This statement and any other financial or other information that the undersigned gives OUCU shall be the property of OUCU.			
SIGNATURES			
Signature: _____		Date: _____	
Signature: _____		Date: _____	

To Print:

- Complete form
- Save as new file

To Email:

Please contact us to receive a secure link to submit your items. Protecting our members' personal information is very important to us. Please never include non-public and confidential personal information in an email or attachment.



944 East State St.
Athens, Ohio 45701
PH: 740-447-5202
FX: 740-597-2874
business@oucu.org

Business Name: _____

Non-Real Estate Business/Debt Schedule

Instructions: List all loans to your business/affiliated business that are not on your Personal Financial Statement. Examples include business equipment loans, business vehicle loans, business credit cards and capital leases.

Creditor Name (To Whom Payable)	Current Balance	Credit Limit (if line of credit)	Monthly Payment	Collateral Securing the Debt
TOTAL:				

CERTIFICATION: The undersigned hereby certified that he/she is either the/an owner of the Business identified above or an authorized representative of the/an owner, and the information herein is true and correct.

Signature: _____

Name (print): _____

Title: _____

Date Completed: _____

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Real Estate Schedule

Please complete for real estate owned (personal and business)

944 East State Street, Athens, Ohio 45701
FX: 740-597-2874 | PH: 740-447-5202
business@oucu.org

Type Key: A = apartments, MF = 2-4 units, SF = single-family investment, C = commercial, O = office, R = retail, M = mixed-use, L = lot (copy and attach additional sheets if necessary)

Property Address				Property Owner		% Owned
Date Acquired	# of Units	Total Monthly Rent(s)	Original Cost	Current Market Value	Current Loan Balance	
Credit Limit (If Line of Credit)		Monthly Loan Payment	Annual Property Taxes	Escrow	Name of Creditor	

Property Address				Property Owner		% Owned
Date Acquired	# of Units	Total Monthly Rent(s)	Original Cost	Current Market Value	Current Loan Balance	
Credit Limit (If Line of Credit)		Monthly Loan Payment	Annual Property Taxes	Escrow	Name of Creditor	

Property Address				Property Owner		% Owned
Date Acquired	# of Units	Total Monthly Rent(s)	Original Cost	Current Market Value	Current Loan Balance	
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Date Acquired	# of Units	Total Monthly Rent(s)	Original Cost	Current Market Value	Current Loan Balance	
Credit Limit (If Line of Credit)		Monthly Loan Payment	Annual Property Taxes	Escrow	Name of Creditor	

CERTIFICATION: The undersigned hereby certifies that he/she is either the/an owner of each the Properties listed herein in the percentage indicated above, or is an authorized representative of the/an owner, the information herein is true and correct, and a copy or facsimile of this worksheet is considered as valid and binding as the original.

Authorized Signature: _____ **Name (Print):** _____

Title (if applicable): _____ **Date:** _____

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Title (if applicable): _____ **Date:** _____

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