

Business Owner Financing Questionnaire

Professional Real Estate Loans (multi-family real estate, commercial real estate, construction financing)

Property Location	Estimated Market Value	Loan Balance	Interest Rate	Fixed/Variable	Term	Monthly Payment	Loan Maturity Date	Prepayment Penalty
	\$	\$	%	<input type="checkbox"/> / <input type="checkbox"/>		\$		
	\$	\$	%	<input type="checkbox"/> / <input type="checkbox"/>		\$		

Other Professional Loans (lines of credit, equipment financing, term loans, business acquisition, equipment leasing)

Loan Type	Creditor	Loan Balance	Interest Rate	Term	Monthly Payment
		\$	%		
		\$	%		
		\$	%		
		\$	%		

What type of business do you own? Sole S Corp C Corp LLC Partnership Govt. Non-Profit

What industry is your business in? _____

How does your business handle its financing needs? _____

Do you own or lease the building in which your business operates? Own Lease

If you do own, is there any debt outstanding? Yes No

If you are leasing, do you have any plans to purchase a commercial building? Yes No

Is your business seasonal? Yes No

How do you travel for business? Commercial Airline Private Jet Other _____

Are you in the market to sell any existing property and acquire new property? Yes No

Do you have any expansion plans that may require the purchase of equipment or a facility? Yes No

Who handles your business financing needs? _____

Client Name: _____

Date Reviewed: _____

Investment and Insurance Products:
 ► NOT FDIC Insured ► NO Bank Guarantee ► MAY Lose Value