

**LOAN APPLICATION**  
**Minimum loan amount \$100,000**

Name of Organization: \_\_\_\_\_

Primary Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Tax ID: \_\_\_\_\_

E-mail: \_\_\_\_\_ Web Address: \_\_\_\_\_

**PURPOSE OF LOAN**

**Amount:**

Refinance Existing Debt \$ \_\_\_\_\_

Finance Property Acquisition \$ \_\_\_\_\_

Building Improvements/Repairs/Expansion \$ \_\_\_\_\_

Construction of New Facility \$ \_\_\_\_\_

Revolving Line of Credit for \_\_\_\_\_ \$ \_\_\_\_\_

**Total Loan Request: \$ \_\_\_\_\_**

**GENERAL INFORMATION**

Date your organization was founded and by whom: \_\_\_\_\_

Denomination (if any): \_\_\_\_\_

Number of people in congregation: \_\_\_\_\_

Length of time at your present location: \_\_\_\_\_ Est. value of property: \$ \_\_\_\_\_

Brief Property Description: \_\_\_\_\_

Senior Pastor: \_\_\_\_\_ Since: \_\_\_\_\_

Number of staff members: \_\_\_\_\_ Number of Associate Pastors: \_\_\_\_\_

Names of Corporate Officers: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Number of active volunteers: \_\_\_\_\_ Number on Board of Directors: \_\_\_\_\_

Names of Board Members: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is Board action necessary to approve loan? \_\_\_\_\_ Is congregation's approval necessary? \_\_\_\_\_

Number of Ministry and Outreach Programs: \_\_\_\_\_

Do you have a Capital Campaign?  Yes  No What is the start date? \_\_\_\_\_

What is the length of the campaign? \_\_\_\_\_ How much are you planning to raise? \_\_\_\_\_

Did you use a professional fundraiser?  Yes  No If yes, who? \_\_\_\_\_

**CURRENT BANKING RELATIONSHIP**

Existing Loan Amount: \$ \_\_\_\_\_ Rate: \_\_\_\_\_ Maturity: \_\_\_\_\_

Current Bank: \_\_\_\_\_ Average Deposits: \$ \_\_\_\_\_

Average Investable Balances: \$ \_\_\_\_\_

**ATTENDANCE AND MEMBERSHIP INFORMATION**

Year 20 20 20

Number of Adult Members \_\_\_\_\_

Avg. Weekly Adult Attendance \_\_\_\_\_

Preschool/School Enrollment \_\_\_\_\_

Worship Services per Week \_\_\_\_\_

Percentage of your present congregation in each of the following age groups:

0-18 Years: \_\_\_\_\_ 19-30 Years: \_\_\_\_\_ 31-65 Years: \_\_\_\_\_ Over 65 years: \_\_\_\_\_

When did you last update your membership roll? \_\_\_\_\_

Anything else you would like us to know? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## DOCUMENT CHECKLIST

The following are categories of information included within this application. If you are unable to include an item, please comment. If this information has been prepared in a format different than in this application, you need not transcribe it into this form, but instead, attach it to the application.

		<b>Enclosed</b>	<b>Not Enclosed</b>	<b>Not Applicable</b>
1.	GENERAL INFORMATION Comments:			
2.	BRIEF HISTORY OF RELIGIOUS INSTITUTION Comments:			
3.	CERTIFICATE AND ARTICLES OF INCORPORATION Comments:			
4.	ORGANIZATION BY-LAWS (WITH AMENDMENTS, IF ANY) Comments:			
5.	BOARD RESOLUTION FOR PROPOSED FINANCING Comments:			
6.	IRS TAX EXEMPT DETERMINATION [501(c)(31)] Comments:			
7.	PROFILE / RESUME OF SENIOR LEADER Comments:			
8.	LOAN REQUEST INFORMATION Comments:			
9.	3 YEARS' FINANCIAL STATEMENTS - RELIGIOUS INSTITUTION Comments:			
10.	3 YEARS' FINANCIAL STATEMENTS - SCHOOL Comments:			
11.	3 YEARS' ATTENDANCE* STATISTICS Comments:			
12.	LEGAL DESCRIPTION(S) OF ALL REAL PROPERTY(IES) Comments:			
13.	COST BREAKDOWN (FOR CONSTRUCTION REQUESTS) Comments:			

\*If attendance is not applicable, please include information regarding demonstrated donor base.

Please list other information you have included: