**Commercial Loan Information Sheet**

Date: _______________

Submitted by: ______________________ Member’s Account Number(s) ____________________

Business Name: __________________________________________________________________

Owner’s Name(s): __________________________________________________________________
________________________________________________________________________________

Phones: Business ____________ Cellular: ______________ Email: _______________________

Contact’s Name: _____________________ Date of Original Meeting: ______________________

Amount Requested $_________________ Purpose of Loan: ___________________________

Terms Requested including rate, time frame and collateral: ____________________________________________________________________________
_______________________________________________________________________________

*Checklist:
_______ Business Loan Application signed and dated by each principal (20% ownership);
_______ Business Tax Returns for the past two years;
_______ Interim Financial Statements, (P & L, Balance Sheet), less than 30-days old;
_______ Personal Financial Statement on each borrower and/or guarantor;
_______ Personal Income Tax Returns for the past two years on each principal;
_______ Active Personal account for each principal and business account(s) opened with ASI;
_______ Business Documentation including Articles of Organization, Meeting Notes, Tax ID etc.
_______ Short narrative describing your business and how the loan will be used;
_______ A complete business plan for all start-up companies

OnPath FCU Employee Signature: _________________________ Teller Number: ______________

* Additional information may be necessary depending on the individual circumstances.

Fax info sheet to: (504) 734-7351, Email notification to business lending, Get Business Card

Revised 9/2011