

**LOAN APPLICATION**  
**Minimum loan amount \$2,000,000**

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 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, which one? \_\_\_\_\_

**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 \_\_\_\_\_

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: \_\_\_\_\_

Anticipated membership and worship attendance for the next three years:

Year 20 20 20

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

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

Total Number of New Members Last 12 Months: \_\_\_\_\_

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

**SUMMARY FINANCIALS (or attach 3 years of financial statements)**

Year	<u>20</u>	<u>20</u>	<u>20</u>
General Fund	\$ _____	\$ _____	\$ _____
Building Fund	\$ _____	\$ _____	\$ _____
School Income	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
Total Income	\$ _____	\$ _____	\$ _____
Total Expenses	\$ _____	\$ _____	\$ _____
Net Income	\$ _____	\$ _____	\$ _____

**SCHOOL INFORMATION (if applicable)**

Name: \_\_\_\_\_

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

Head of Schools Name: \_\_\_\_\_

	<u>Number of students</u>	<u>Annual Tuition per Student</u>
Preschool	_____	_____
Kindergarten	_____	_____
1-6 Grade	_____	_____
7-8 Grade	_____	_____
9-12 Grade	_____	_____

Total number of students enrolled in last three years:

	<u>20</u>	<u>20</u>	<u>20</u>
Preschool	_____	_____	_____
Kindergarten	_____	_____	_____
1-6 Grade	_____	_____	_____
7-8 Grade	_____	_____	_____
9-12 Grade	_____	_____	_____

What is your school's fiscal year end? \_\_\_\_\_

Number of teachers/administrators: Full time: \_\_\_\_\_ Part time: \_\_\_\_\_

Do you provide day care (either before or after school)?  Yes  No

Are school facilities:  Owned  Leased/rented

Is the school accredited?  Yes, by \_\_\_\_\_  No

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_