

Fundation Lending Program Privacy Policy - We respect and are committed to protecting your privacy. The personal and financial information you provide will be used by us to process your application, maintain your account, respond to court orders and legal investigations or report to credit bureaus, as applicable. Your personal and financial information will not be sold or shared with third parties for purposes beyond those identified in this privacy policy.

Personal Identification Information

Full Name	<input type="text"/>
Date of Birth	<input type="text"/>
Residence Address	<input type="text"/>
City, State, & Zip Code	<input type="text"/>
Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
E-Mail Address	<input type="text"/>

Business Identification Information

Business Name (DBA)	<input type="text"/>
Business Legal Name	<input type="text"/>
Corporate Structure (check one)	<input type="checkbox"/> C-Corporation <input type="checkbox"/> S-Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship
State of Incorporation	<input type="text"/>
Industry Description	<input type="text"/>
Business Address	<input type="text"/>
City, State, & Zip Code	<input type="text"/>
Business Phone	<input type="text"/>

Personal Financial Profile

Do You Own or Rent Your Residence?	<input type="checkbox"/> Own	<input type="checkbox"/> Rent
Time at Current Address:	<input type="text"/> Years	<input type="text"/> Months
Do You Have a Life Insurance Policy?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do You Have a Disability Insurance Policy?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Social Security #:	<input type="text"/>	
Approximate Household Income:	<input type="text"/>	
Annual Charitable Donations:	<input type="text"/>	

Assets

Cash & Deposit Accounts \$
IRA or Ither Retirement Accts \$
Investment & Brokerage Accts \$
Real Estate \$
Automobiles \$
Total Assets \$

Liabilities

First Mortgages on Real Estate \$
Home Equity Loans & Lines \$
Auto Loans \$
Other Personal Loans \$
Other Liabilities \$
Total Liabilities \$

Business Profile

Approximate Annual Sales: \$
Approximate Annual Pre-Tax Earnings: \$
Number of Full Time Employees:
Is This Business a Franchise? ☐ Yes ☐ No
Is This Business a Wholly Owned Subsidiary? ☐ Yes ☐ No
If Yes, Name of Parent Company:
Do You Rent or Own Your Office Space? ☐ Rent ☐ Own
If Rent, How much is your Monthly Rent? \$
Does Your Business Have Property and/or Liability Insurance? ☐ Yes ☐ No
Employee Benefits Offered: ☐ Health ☐ Retirement ☐ Both ☐ None
Approximate # of Paying Customers: ☐ <10 ☐ 10 - 50 ☐ 51 - 250
☐ 251 - 1,000 ☐ 1,001 - 2,000 ☐ 2,001+

Business Ownership Profile

Employer Identification Number / Tax ID Number
What is Your Title at This Company?
What Percentage of This Business Do You Own?
Are There Other Owners if This Business?

(If yes, complete items below)

Owner #2

Full Name
Ownership Percentage
E-Mail Address
Will Serve as a Loan Guarantor? ☐ Yes ☐ No

Owner #3

Full Name

Ownership Percentage

E-Mail Address

Will Serve as a Loan Guarantor?

☐

Yes

☐

No

Owner #4

Full Name

Ownership Percentage

E-Mail Address

Will Serve as a Loan Guarantor?

☐

Yes

☐

No

Loan Request Details

Amount

\$

Term (Years)

☐

2

☐

3

☐

4

Use of Proceeds (explain how you plan to use this money)

Other Credit Relationships

Name of Creditor

Purpose of Loan

Original Loan Amount \$

Amount Outstanding \$

Repayment Term

Maturity Date

Collateral Type

☐

Unsecured

☐

Secured

If Secured, Please Describe Security Type:

Name of Creditor

Purpose of Loan

Original Loan Amount \$

Amount Outstanding \$

Repayment Term

Maturity Date

Collateral Type

☐

Unsecured

☐

Secured

If Secured, Please Describe Security Type:

Authorization to Access Personal Credit File

By signing below, you understand and agree that you are authorizing and instructing Foundation, Inc., a Delaware corporation ("Foundation") to obtain consumer reports and related information about you from one or more consumer reporting agencies, such as TransUnion, Experian, and Equifax.

You also authorize Foundation to make any inquiries it decides are necessary to verify the accuracy of the information contained in your application, and you understand and agree that Foundation may contact third parties to verify any such information. You further understand and agree that foundation may use your consumer reports to make credit decisions and for related purposes.

You authorize and instruct Foundation to obtain your consumer reports each time you request a loan, during the processing of closing a loan to you, or at various times during the term of your loan in connection with the servicing, monitoring, collection or enforcement of the loan.

Business Loan Application Acknowledgement

By submitting this application you specifically represent to foundation (the "Lender") and agree and acknowledge that: (1) the information provided in this Loan Application and other requested and required information for the purpose of obtaining credit is true, accurate, and complete as of the date this application is submitted for a final credit decision; (2) the Lender has not made any commitment to approve the Loan Application and extend credit, unless otherwise agreed to in writing; (3) the Lender is authorized to conduct any inquiries it decides are necessary to verify the accuracy of the information contained in the Loan Application and is also authorized to obtain credit reports from credit reporting agencies on the Loan Applicant; (4) the Lender is authorized to answer any questions from others about the Lender's credit experience with the Loan Applicant; (5) Lender is authorized to retain the Loan Application, whether or not Lender approves any extension of credit; (6) if credit is granted, the Lender is authorized to obtain credit information regarding the Loan Applicant from time to time during any time that the loan has an outstanding balance in connection with the servicing, monitoring, collection, or enforcement of the loan; and (7) the Lender shall not be liable for any claim arising from the use of information provided to the Loan Applicant or for providing such information to others.

Signature _____

Full Name _____

Date _____

Other Items to Send Small Business Loans Group

3 Most Recent Bank Statements from All Commercial Banking Accounts

2 Most Recent, Complete Tax Returns for Business