



## GENERAL COMPANY INFORMATION

**Borrower/Owner Names(s):**

(select state)

%

## OPERATING DETAILS

**Bank Account Type:**

Business

Personal

If *Personal*, does a separate Business account exist?

Yes

No

**Number of Employees (including 1099):**

Note: Do not include owners in this number

**Does the business operate out of your home?**

Yes

No

If *No*, enter the total number of physical locations?

**Business Expense Ratio (%)**

Note: Expense ratios less than 50% must be supported by a verifiable third party CPA/Tax Preparer/Bookkeeper statement

## FORM COMPLETED BY

**Printed Name:**

**Are you an owner, company CPA, or tax preparer?**

Owner

CPA

Tax Preparer

If CPA or tax preparer complete the following:

Company Name:

Physical Address:

Email Address:

Phone:

**Signature:**

**Date:**