



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?

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: