

Type of Loan Request

Payment Protection Program (PPP) *Please provide your Borrower SBA PPP Application with this form.*

SBA Lender ID Number _____ SBA Loan Application Number _____
 SBA Loan Number _____ Lender Loan Number (Internal) _____

DOCUMENT PREPARATION REQUEST

Loan Details:

Credit Union:		Loan No:	Loan Officer:		LO Title:
Existing Borrower: <input type="checkbox"/> Yes <input type="checkbox"/> No		Borrower Name:		Member Business Ln?: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Loan Type:	Closing Date:	Time of Closing:	Ln Amount: \$	Pymt Due Day:	
1 st Payment:	Maturity Date:	Payment Frequency:		Term:	Amort:
Interest Calc: Select One	Payment Type:		Payment Amount: \$	Initial Rate: %	
<input type="checkbox"/> Fixed <input type="checkbox"/> Adjustable	Index: Select One If Other:		Margin:	Floor:	Ceiling:
Change Frequency: Select One		1 st Change Date:	If rate changes, change payment: Select One		
Prepayment: Select One	Grace Days:	Late Charge: %	Billing Method: ACH (Attach form for ACH)		
Purpose Description:					
Comments:					

Fees:

<input type="checkbox"/> Accrued Interest Payable To:			<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Appraisal Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Environmental Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Flood Search Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> UCC Search Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> UCC Filing Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Credit Report Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Origination Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Underwriting Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Doc Prep Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Title Policy/Search Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Recording Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Vehicle Lien Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Mortgage Registration Tax Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:
<input type="checkbox"/> Payable To:	<input type="checkbox"/> Financed – Add to Loan	<input type="checkbox"/> Financed – Take from Loan	<input type="checkbox"/> Paid by Borr	Amount:

SCLRI Use Only	<input type="checkbox"/> Reviewed w/ changes	<input type="checkbox"/> Reviewed w/ NO changes
Questions:		
Laser Pro #: _____	Drafted By: _____	
Reviewed by _____	Date _____	

Borrowers:

(If the Borrower/Guarantor is in WI, please provide the spouses name, address, birthdate and social security # in the comments section. It only needs to be provided if the Spouse will not be a Borrower/Guarantor on the loan)

Borrower 1:		TIN or EIN:
Borrower Type: <input type="checkbox"/> Individual <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> DBA <input type="checkbox"/> Partnership <input type="checkbox"/> LLC <input type="checkbox"/> Corporation <input type="checkbox"/> Trust		
Address:	Total # of Authorized Signers: (add attachment if more lines are needed)	# of Signatures Required on docs:
Authorized Signer Name:	Title:	<input type="checkbox"/> Signing documents?
Authorized Signer Name:	Title:	<input type="checkbox"/> Signing documents?
Authorized Signer Name:	Title:	<input type="checkbox"/> Signing documents?

Authorized Signer 1:	TIN or EIN:
Address:	

Authorized Signer 2:	TIN or EIN:
Address:	

Comments:

Financial Reporting Requirements:

Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
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Comments:

Additional Documents to Provide (if available):

- 1. Any applicable supporting documentation**