			Ty	pe of	Loan Re	equest						
☐ New Request	New Request ☐Renewal		□ СІТ			☐ Other						
			СОММ			I WORK:	SHEET					
Credit Union:		Loan No	:		Loan	Officer:			Amort	ized 🗌 B	illed Interest	
xisting Borrower:  Yes No Bor			Borrowe	orrower Name:					er Busine	ess Ln?:	Yes 🗌 No	
Loan Type:	Loar	Loan Date: Fu			ding Date: Ln Am			Amount:	\$	Pymt Due	Day:	
1 <sup>st</sup> Payment:	laturity	aturity Date: P			yment Frequency:				Term:	1	Amort:	
Interest Calc: Select One	Pa	ayment T	уре:		Payment Amount				•	e: %		
☐ Fixed ☐ Adjustable	☐ Fixed ☐ Adjustable ☐ If Other:			Margin:				Floor:		Ceiling:		
Change Frequency:	1			1 <sup>st</sup> Change Date:			If rate changes, o			payment:		
Prepayment:	Grace Days:				harge:	%	Bill	ing Meth	od: (Atta	d: (Attach form for ACH)		
Member Number (if applicable):				Risk Rating: SBA Loa						nn? Yes No		
Purpose: Purpos			e Description:									
Comments:												
Fees:												
☐ Accrued Interest									☐ Pa	id by Borr	Amount:	
☐ Appraisal	□ F	Financed -	– Add to	Loan	Fir	nanced –	Γake fro	m Loan	☐ Pa	id by Borr	Amount:	
☐ Environmental	□ F	inanced -	– Add to	Loan	Fir	nanced –	Γake fro	m Loan	☐ Pa	id by Borr	Amount:	
☐ Flood Search	☐ F	inanced -	– Add to	Loan	Fir	nanced –	Γake fro	m Loan	☐ Pa	id by Borr	Amount:	
UCC Search	□ F	- inanced -	– Add to	Loan	☐ Fir	nanced – <sup>1</sup>	<mark>Γake fro</mark>	<mark>m Loan</mark>	☐ Pa	id by Borr	Amount:	
UCC Filing	□ F	Financed -	– Add to	Loan	☐ Fir	nanced – <sup>*</sup>	Г <mark>аке fro</mark>	<mark>m Loan</mark>	☐ Pa	id by Borr	Amount:	
Credit Report	□ F	Financed -	– Add to	Loan	☐ Fir	nanced – <sup>1</sup>	Г <mark>аке fro</mark>	<mark>m Loan</mark>	☐ Pa	id by Borr	Amount:	
Origination	☐ F	inanced -	– Add to	Loan	Fir	nanced –	Take fro	m Loan	☐ Pa	id by Borr	Amount:	
□ Unadamonitina		inanced -	– Add to	Loan	Fir	nanced –	Take fro	m Loan	☐ Pa	id by Borr	Amount:	
Underwriting										· · · · · · · · · · · · · · · · · · ·		
☐ Doc Prep		inanced -	– Add to	Loan	Fir	nanced –	Take fro	m Loan	☐ Pa	id by Borr	Amount:	
	F	Financed -				nanced – ·				id by Borr id by Borr	Amount:	
☐ Doc Prep	F		– Add to	Loan	☐ Fir		Γake fro	m Loan	☐ Pa			
☐ Doc Prep ☐ Title Policy/Search		inanced -	– Add to	Loan Loan	☐ Fir	nanced –	Γake fro Γake fro	m Loan m Loan	☐ Pa	id by Borr	Amount:	
☐ Doc Prep ☐ Title Policy/Search ☐ Recording		inanced -	– Add to – Add to – Add to	Loan Loan Loan	Fir	nanced – ·	Take fro Take fro	m Loan m Loan m Loan	☐ Pa	id by Borr	Amount:	

DSCR Y N

Collateral Det	tails:												
Collateral #:	Ty	уре:					Stree	t Addr	ess:			City:	
State:	Zip: County:			Lie	en Position:			Value: \$		Valuation Date:			
Valuation Source:			UCC? Yes		No	No Serial Num		ıber:		Comments:			
RE Type:		Owner	: :		# Units	S:	# Buil	dings	Flo	ood Cert ID:		Determination Date:	
Flood Ins Req		# Parc	els:	Parcel ID:				Prop	perty Taxes Paid		Escrow: Yes No (Attach escrow form if "Yes")		
Hazard Insura		nt: \$		Insur	ance A	gent	informa	ation:				,	
				1									
Collateral #: Type:				Street Address:						City:			
State:	Zip:		Coun	ounty:			ien Position:			Value: \$		Valuation Date:	
Valuation Sou	rce:	1	File	UCC?	☐ Yes		No	Seria	al Nun	nber:	C	Comments:	
RE Type:		Owner	· <u>·</u>		# Units	S:	# Buil	dings	Flo	ood Cert ID:		Determination Date:	
Flood Ins Req		# Parc		Parcel ID:						Property Taxes Paid		Escrow: Yes No	
Yes No		.t. ¢					Throu			ough:	(	Attach escrow form if "Yes")	
Hazard Insura	nce An	п. Ф		IIISUI	ance A	Jeni	IIIIOIIII	alion.					
Collateral #:	ollateral #: Type:					Street Address:					City:		
State:	Zip:		Coun	tv:		Lie	l en Posit	n Position: Value: \$			Valuation Date:		
Valuation Sou	<u>'</u>				Yes		No		Serial Number:		C	Comments:	
DE T		0			# Units	S:	# Buil	dinas	Flo	ood Cert ID:		Determination Date:	
RE Type: Flood Ins Req	uired:	Owner # Parc						Property Taxes Paid		l	Escrow: Yes No		
Yes No		# raic	CIS.	Parcel ID:					ough:		(Attach escrow form if "Yes")		
Attach addition  Comments:  Borrowers:													
•					-							e and social security # in /Guarantor on the loan)	
Borrower 1:													
Borrower Type	e: 🔲 I	Individu	al 🗌	Sole F	Proprieto	or [	] DBA	□ P	artner	ship LLC	] Coi	rporation	
TIN or EIN:				С	ontact N	lame	e:				Со	ntact Phone:	
Street Address			ione	ne:		Total # of Authorized Signers: (add attachment if more lines are needed)		<u> </u>	# of Signatures Required on docs:				
Authorized Sig						_	itle:					Signing documents?	
Authorized Signer Name:  Authorized Signer Name:					_	Title:				<u>                                     </u>	Signing documents?		
Authorized Sig	iner Na	me:					ille:					Signing documents?	
Borrower 2:													
Borrower Type	e: 🔲 I	Individu	al 🔲	Sole F	Proprieto	or [	] DBA	P	artner	ship LLC	Coı	rporation  Trust	
7100						_	- '				_	· —	

Contact Name:

Contact Phone:

TIN or EIN:

Street Address:	Mailing Address: Pho		one:	Total # of Authorized Signers: (add attachment if more lines are needed)		# of Signatures Required on docs:			
Authorized Signer Nan	ne:		Title:			Signing documents?			
Authorized Signer Nan	ne:		Title:			] Signing documents?			
Authorized Signer Nan	ne:		Title:			] Signing documents?			
Comments:									
Guarantors:									
(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)									
Guarantor 1:									
Guarantor Type:	ndividual   Sole Pro	prieto	r 🗌 DBA 📙	Partnership LLC	Со	rporation  Trust			
TIN:	Cont	a a t Nia			Contact Phone:				
	Conta	act Na	ame:		Co	ntact Phone:			
Street Address:	Mailing Address:	one:	Total # of Authorized Signers: (add attachment if more lines are needed)		# of Signatures Required on docs:				
Authorized Signer Nan	ne:		Title:			Signing documents?			
Authorized Signer Nan			Title:			Signing documents?			
Authorized Signer Nan	ne:		Title:			Signing documents?			
Guarantor 2:									
Guarantor Type:	ndividual	prieto	r 🗌 DBA 📙	Partnership LLC	Co	rporation			
TIN:	Conta	act Na	ame:		Co	ntact Phone:			
Street Address:  Mailing Address:  Phone:  Total # of Authorized Signers: (add attachment if more lines are needed)  # of Signatures Record on docs:									
Authorized Signer Nan	ne:		Title:			Signing documents?			
Authorized Signer Nan			Title:			Signing documents?			
Authorized Signer Nan	ne:		Title:			Signing documents?			
Guarantor 3:									
Guarantor Type:	ndividual 🔲 Sole Pro	prieto	r 🗌 DBA 🔲	Partnership LLC	Со	rporation			
TIN:	Conta	ame:			ntact Phone:				
Street Address:	Mailing Address:	Pho	ne: Total # of Authorized Signers: (add attachment if more lines are needed)			# of Signatures Required on docs:			
Authorized Signer Nan	ne:		Title:			Signing documents?			
Authorized Signer Nan	ne:		Title:			Signing documents?			
Guarantor 4:									
Guarantor Type:	ndividual 🔲 Sole Pro	prieto	r 🗌 DBA 📙	Partnership LLC	Со	rporation			
TIN:	Cont	act Na	ame.		Ca	ntact Phone:			
Street Address:	Mailing Address: Pho			Total # of Authorized Signers: (add attachment if more		# of Signatures Required on docs:			
Authorized Other		<u> </u>	T:0.	lines are needed)					
Authorized Signer Nan			Title:			Signing documents?			
Authorized Signer Nan			Title:		늗	Signing documents? Signing documents?			
Authorized Signer Nan			Title:		늗	Signing documents?			

Comments:

## Financial Reporting Requirements:

Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Туре:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Borr(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
Guar(s) #:	Type:		Frequency:	Due (# days after st	mt date):
	s the loan closing?: [		☐ At Title Company	☐ At Attorney's Office	
	CU Member Business, I				
	f Closing Agent?: At (		At Title Com	pany: At Att	orney:
At CU	Member Business, Inc.	:	At Other:		
3. Who is	responsible for record	ding of applicable	closing documents	s?:	
☐ Cre	dit Union 🗌 Title Com	oany   Attorney's	Office CU Member	er Business, Inc  Other:	
Exceptions (i.e	. Secretary of State UC	C Filing?):			
	Internal Use Only	☐ Reviewed w/	changes	☐ Reviewed w/ NO chang	ges
Ques	tions:				
Ques	uons.				
Revie	ewed by		Date:		