



**LOAN APPLICATION**  
**Minimum loan amount \$1,000,000**

Name of Organization: \_\_\_\_\_

Primary Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Tax ID: \_\_\_\_\_

E-mail: \_\_\_\_\_ Web Address: \_\_\_\_\_

**PURPOSE OF LOAN**

**Amount:**

Refinance Existing Debt \$ \_\_\_\_\_

Finance Property Acquisition \$ \_\_\_\_\_

Building Improvements/Repairs/Expansion \$ \_\_\_\_\_

Construction of New Facility \$ \_\_\_\_\_

Revolving Line of Credit for \_\_\_\_\_ \$ \_\_\_\_\_

**Total Loan Request:** \$ \_\_\_\_\_

**GENERAL INFORMATION**

Date your organization was founded and by whom: \_\_\_\_\_

Denomination (if any): \_\_\_\_\_

Number of people in congregation: \_\_\_\_\_

Length of time at your present location: \_\_\_\_\_ Est. value of property: \$ \_\_\_\_\_

Brief Property Description: \_\_\_\_\_

Senior Pastor: \_\_\_\_\_ Since: \_\_\_\_\_

Number of staff members: \_\_\_\_\_ Number of Associate Pastors: \_\_\_\_\_

Names of Corporate Officers: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of active volunteers: \_\_\_\_\_ Number on Board of Directors: \_\_\_\_\_

Names of Board Members: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Is Board action necessary to approve loan? \_\_\_\_\_ Is congregation's approval necessary? \_\_\_\_\_

Number of Ministry and Outreach Programs: \_\_\_\_\_

Do you have a Capital Campaign?  Yes  No What is the start date? \_\_\_\_\_

What is the length of the campaign? \_\_\_\_\_ How much are you planning to raise? \_\_\_\_\_

Did you use a professional fundraiser?  Yes  No If yes, who? \_\_\_\_\_

### **CURRENT BANKING RELATIONSHIP**

Existing Loan Amount: \$ \_\_\_\_\_ Rate: \_\_\_\_\_ Maturity: \_\_\_\_\_

Current Bank: \_\_\_\_\_ Average Deposits: \$ \_\_\_\_\_

Average Investable Balances: \$ \_\_\_\_\_

### **ATTENDANCE AND MEMBERSHIP INFORMATION**

Year 20 20 20

Number of Adult Members \_\_\_\_\_

Avg. Weekly Adult Attendance \_\_\_\_\_

Preschool/School Enrollment \_\_\_\_\_

Worship Services per Week \_\_\_\_\_

Percentage of your present congregation in each of the following age groups:

0-18 Years: \_\_\_\_\_ 19-30 Years: \_\_\_\_\_ 31-65 Years: \_\_\_\_\_ Over 65 years: \_\_\_\_\_

When did you last update your membership roll? \_\_\_\_\_

Anything else you would like us to know? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

In order to process your loan request, we may need some or all of the following items:

- Purpose of loan request
- History of organization
- Articles of Incorporation
- By-Laws
- IRS 501 (c) (3) Tax Exempt Determination
- Last three years financial statements
- Interim financial statements
- Current budget
- List of 15 largest contributors (current FYE)
- List of the members of Board of Directors
- Last three years attendance/membership/enrollment figures
- Appraised value of property (if available)
- Background/Resume on Pastor/Rabbi and senior management team
- Organizational literature ie bulletin/newsletter/brochure or other collateral material
- Facility/Equipment Lease Agreements (if applicable)
- Any outside consultant contracts

Construction loans may require the following:

- Information on Capital Campaign
- Architect's name and contract, if executed
- Contractor's name and contract, if executed
- Preliminary construction budget/cost breakdown
- Sources and uses breakdown
- Plans and Specifications
- Timeline
- List of pre-paid items (costs, fees, etc)
- List of construction committee members

Additional information and documentation may be necessary to process your application.

Thank you for your interest in partnering with **Community *First* Financial Resources**.

We look forward to serving you.