

# SAMPLE Loan Application Form

**Are you the primary applicant or a co-borrower?**

Primary Applicant

**Primary Applicant's Email**

Sample@gmail.com

**Will you be applying with a co-applicant?**

No

**Co-Applicant's Email**

Sample

**Name**

Sample Sample

Sample

**SSN**

000-00-0000

**Birth Date**

1/1/1990

**Marital Status**

Unmarried: Single, Divorced, Widowed, Civil Union, Domestic Partnership, Registered Reciprocal Beneficiary Relationship

Unmarried

**Citizenship**

Other

**Type of Credit**

Empty

**Total Number of Borrowers**

Empty

**Drivers License (DL) #**

Sample

**DL Issue Date**

1/1/1990

**DL Issue State**

California

**Alternate Names**

List any names by which you are known or any names under which credit was previously received (First, Middle, Last, Suffix).

Sample

**Number of Dependents**

Empty

**Ages of Dependents**

Empty

**Cell Phone**

(000) 000-0000

**Home Phone**

Empty

**Work Phone**

Empty

**Work Phone Extension**

Empty

**Email**

[sample@gmail.com](mailto:sample@gmail.com)

**Preferred Method of Contact**

Cell

**Street Address with Unit #**

Sample

Sample

**City**

Sample

**State**

California

**Zip / Postal Code**

Sample

**Home County**

Empty

**Years**

Enter 0 if none.

0

**Months**

Enter 0 if none.

0

**Housing**

Own

**Landlord's Name**

Empty

**Rent per month**

Empty

**Landlord's Contact Person - Name**

Empty

**Landlord's Contact Person - Phone**

Empty

**Landlord's Contact Person - Email**

Empty

**Is Mailing Address same as Home Address?**

Yes

**Mailing Street Address with Unit #**

Empty

**Mailing City**

Sample

Empty

**Mailing State**

Empty

**Mailing Zip / Postal Code**

Empty

**Mailing County**

Empty

**Previous Street Address with Unit #**

Sample

**Previous City**

Sample

**Previous State**

California

**Previous Zip / Postal Code**

Sample

**Years**

Enter 0 if none.

1

**Months**

Enter 0 if none.

0

Sample

**Previous Housing**

Rent

**Previous Rent per Month**

0

**Personal Reference 1****Reference 1 Name**

Sample

**Reference 1 Relationship**

Sample

**Reference 1 Phone**

(000) 000-0000

**Reference 1 Email**

[sample@gmail.com](mailto:sample@gmail.com)

Sample

**Personal Reference 2****Reference 2 Name**

Sample 2

**Reference 2 Relationship**

Sample 2

**Reference 2 Phone**

(000) 000-0000

**Reference 2 Email**

[sample@sbcglobal.net](mailto:sample@sbcglobal.net)

Section Divider

**Currently Employed**

Other Employment

**Multiple Employers**

No

**Are you a business owner?**

Empty

**Percentage of Business Owned**

Empty

Sample

**Employer or Business Name**

Sample

**Employer's Email**

[sample@yahoo.com](mailto:sample@yahoo.com)

**Employer's Contact**

Sample

**Employer's Phone**

(000) 000-0000

**Employer's Street Address with Unit #**

Sample

**Employer's City**

Sample

**Employer's State**

California

**Employer's Zip / Postal Code**

00000

**Employer's County**

Sample

Sample

**Salary Type**

Weekly

**Position or Title**

Empty

**Employment Start Date**

1/1/1990

**Employed by Family Member?**

Empty

**Years**

Enter 0 if none.

1

**Months**

Enter 0 if none.

0

**Previous Employer's Name**

Sample

**Previous Employer's Contact**

Sample

**Previous Employer's Email**

[sample@gmail.com](mailto:sample@gmail.com)

**Previous Employer's Phone**

(000) 000-0000

**Previous Employer's Street Address**

Sample

**Previous Employer's City**

Sample

**Previous Employer's State**

California

**Previous Employer's Zip / Postal Code**

00000

**Gross Monthly Income**

Total income generated by the business each month, before taxes and other deductions are taken out.

0000.00

Household Income (Monthly)

**Take Home from Business / Employment**

If not applicable, enter 0.

0

**Spouse's Income (If Applicable)**

If not applicable, enter 0.

0

Sample

**Child Support / Alimony Income**

If not applicable, enter 0.

0

**Other Income**

If not applicable, enter 0.

0

Personal Household Expense & Debt Payments (Monthly)

**Child Support / Alimony**

If not applicable, enter 0.

0

**Credit Card Payments**

If not applicable, enter 0.

0

**Education and Childcare**

If not applicable, enter 0.

0

**Food and Clothing**

If not applicable, enter 0.

0

**Healthcare Expenses**

If not applicable, enter 0.

0

**Home Rent / Mortgage & Utilities**

If not applicable, enter 0.

0

Sample

**Insurance, Gasoline, and Vehicle Payments**

If not applicable, enter 0.

0

**Other Household Expenses & Debt Payments**

If not applicable, enter 0.

0

**If applicable, explain any derogatory credit information**

Explain any issues that you have on your credit report and how you are getting them resolved.

Sample

Referred by: Referral Information

**Referred by**

Sample

**Referred by Institution or Company**

Sample

**Gender**

Male

**Race**

Hispanic

**Hispanic Origin?**

Yes

**Minority Owned or Controlled?**

Do not wish to provide

Sample

**Women Owned or Controlled?**

No

**Low income Owned or Controlled?**

Do not know

**LITP (Low-Income Targeted Population) End User**

If the business that your loan is for hires a third party and the majority of the third party are considered low-income then select "Yes" for LITP End Users.

N/A

**IA (Investment Area) End User**

If the business that your loan is for hires a third party and the majority of the third party live in investment areas as defined by the CDFI Fund, then select "Yes" for IA End Users.

NA

**Other Targeted Populations**

NA

**OTP (Other Targeted Population) End User**

If the business that your loan is for hires a third party and the majority of the third party belongs to an "other target populations", then select the proper values from the list.

NA

**Description of Other Approved OTP-Targeted**

Empty

**Description of Other Approved OTP End User**

Empty

Sample

**Are you a co-signer or guarantor on any debt or loan that is not disclosed on this application?**

No

**Are there any outstanding judgements against you?**

No

**Are you currently delinquent or in default on a Federal debt?**

No

**Are you a party to a lawsuit in which you potentially have any personal financial liability?**

No

**Have you conveyed title to any property in lieu of foreclosure in the past 7 years?**

No

**Within the past 7 years, have you completed a pre-foreclosure sale or short sale, whereby the property was sold to a third party and the Lender agreed to accept less than the outstanding mortgage balance due?**

No

**Have you declared bankruptcy within the past 7 years?**

No

**Bankruptcy Type**

Empty

**Did someone help you fill out this application?**

No

**Designee's Name**

Empty

**Designee's Phone Number**

Empty

**Designee's Signature**

Empty

**Business Name**

Sample

**Federal Tax ID (EIN)**

00-0000000

Sample

**Business Street Address with Unit #**

Sample

**Business City**

Sample

**Business State**

California

**Business Zip / Postal Code**

00000

**Business County**

Sample

**Is business mailing address same as physical address?**

Yes

Sample

**Business Mailing Street Address with Unit #**

Empty

**Business Mailing City**

Empty

**Business Mailing State**

Empty

**Business Mailing Zip / Postal Code**

Empty

**Business Mailing County**

Empty

**Years**

Enter 0 if none.

1

**Months**

Enter 0 if none.

0

**Property Ownership**

Rent

**Business Landlord's Name**

Sample

Sample

**Business Landlord's Contact Person - Name**

Sample

**Business Landlord's Contact Person - Email**

[sample@gmail.com](mailto:sample@gmail.com)

**Business Landlord's Contact Person - Phone**

(000) 000-0000

**Business Main Phone**

(000) 000-0000

**Business Mobile Phone**

(000) 000-0000

**Business Other Phone**

Empty

**Business Email**

[sample@yahoo.com](mailto:sample@yahoo.com)

**Business Website**

<https://www.Sample.com>

Section Divider

**Business Ownership Type**

Sole Proprietorship

**Date Business Established**

1/1/2024

**Years**

Enter 0 if none.

1

**Months**

Enter 0 if none.

0

**Business Location Type**

Storefront

**Business Location Type - Other**

Empty

**Industry Type**

Coffee Shop

**Industry Type - Other**

Empty

**Annual Revenue**

0

**Years of Experience**

0

Sample

Section Divider

**Business Description**

Sample

**How much of the time is the business open?**

Part Time

**Accounting System**

Some (informal)

**Number of current part-time employees?**

If no part-time employees enter 0.

1

**Number of current full-time employees?**

If no full-time employees enter 0.

0

**Number of part-time employees you plan to hire in the next 12-24 months?**

If no part-time employees enter 0.

1

**Number of full-time employees you plan to hire in the next 12-24 months?**

If no full-time employees enter 0.

0

**Projected Permanent Jobs to be Created**

Report the number of permanent full-time equivalent jobs, both created and retained, projected to be created in the business due to this financing. If none, enter 0.

1

Sample

Section Divider

**Requested Loan Amount**

\$5,000

**Guarantee by Third Party?**

No

**Loan Purpose**

Describe the purpose(s) of the loan as well as the amount you intend to allocate to each purpose.

Sample - Describe the purpose(s) of the loan as well as the amount you intend to allocate to each purpose.

Limit is 255 characters. Characters remaining: 249.

Section Divider

**Account Receivables Own?**

No

**Account Receivables Value**

0

**Cash Own?**

Yes

**Cash Value**

1

**Equipment Own?**

Yes

**Equipment Value**

1

Sample

**Fixtures Own?**

No

**Fixtures Value**

0

**Furniture Own?**

Yes

**Furniture Value**

1

**Inventory Own?**

No

**Inventory Value**

0

**Machinery Own?**

No

**Machinery Value**

0

**Other Own?**

Yes

**Other Value**

1

Sample

Section Divider

**Business Financials**

Actual

Business Revenues (Monthly)

**Gross Sales**

If not applicable, enter 0.

0

**Other Business Income**

If not applicable, enter 0.

0

**Monthly Income (or Loss)**

If not applicable, enter 0.

0

**Business Expenses & Debt Payments (Monthly)**

**Business Credit Card Payments**

If not applicable, enter 0.

0

**Business Insurance, Gasoline, Miscellaneous**

If not applicable, enter 0.

0

Sample

**Business Leases**

If not applicable, enter 0.

0

**Business Loan Payments**

If not applicable, enter 0.

0

**Business Vehicle Payments**

If not applicable, enter 0.

0

**Business Rent / Mortgage**

If not applicable, enter 0.

0

**Business Utilities**

If not applicable, enter 0.

0

**Salaries and Labor**

If not applicable, enter 0.

0

**Cost of Goods Sold / Supplies**

If not applicable, enter 0.

0

**Other Business Expenses**

If not applicable, enter 0.

0

Sample

**Bank Account Statement**

Last three months, all pages.



[creser-sample.png](#)

**Credit Report**

We only accept credit reports from the following credit bureaus: Experian, TransUnion, and Equifax.



[creser-sample.png](#)

**Personal Tax Returns**

Last two years, all pages.



[creser-sample.png](#)

**Proof of Identity**

Drivers license or state-issued ID. Current photo ID.



[creser-sample.png](#)

### **Additional Documentation**

If any.

 [creser-sample.png](#)

### **Business Bank Account Statement**

Last three months, all pages

 [creser-sample.png](#)

### **Business Lease Agreement**

 [creser-sample.png](#)

### **Business Licenses and Permits**

Any relevant documentation.

 [creser-sample.png](#)

### **Business Plan or Projections**

Website information, products – services pricing, projections

 [creser-sample.png](#)

### **Business Structure**

Sole proprietorship, LLC Articles of Incorporation, Partnership, etc. (All applicable items)

 [creser-sample.png](#)

### **Business Tax Returns**

Last two years of tax returns, all pages. These must be certified by accountant.

 [creser-sample.png](#)

### **Business Taxpayer Identification Number**

Federal and State tax identification numbers should both be uploaded.

 [creser-sample.png](#)

### **General Liability Insurance Coverage**

 [creser-sample.png](#)

### **Liability and Worker's Compensation Insurance**

**Profit and Loss Statement (P&L)**

**Payroll**

**Business Additional Documentation**

If any.

**Borrower Signature**

Sample  
Sample

**Borrower Name**

Print name

Sample

**Borrower Signature Date**

06/09/2025

**Co-Borrower Signature**

Empty

**Co-Borrower Name**

Print name

Empty

**Co-Borrower Signature Date**

Empty

[Creser](#)

Sample