

**Business Loan Fund of Mesa County, Inc.**  
 2591 Legacy Way  
 Grand Junction, CO 81503  
 (970) 243-5242 Phone, (970) 241-0771 Fax  
 www.gjincubator.org

**The Business Growth and Expansion Micro Loan Fund**  
 (Proprietor, partners, officers, directors and all shareholders of outstanding stock – Show 100% of ownership)

Name		Phone # (    )
		Cell # (    )
Residence		
Name of Business		Tax ID#
Business Street Address		Telephone # (    )
City	County	State      Zip
E-Mail Address:		Web Site:
		Dunn & Bradstreet Number:
Structure: ____ Sole Proprietorship, ____ Partnership, ____ Limited Liability Company, ____ S Corporation, ____ C Corporation		

**Company Ownership**

Use a separate sheet if necessary.

Name	Social Security Number	Address & Telephone	% Owned	Military Service From ---- To	Race	Sex

**USES AND SOURCES OF FUNDS**

What are the project costs and from where will funds be obtained?

USES OF PROCEEDS (enter gross dollar amounts rounded to the nearest hundred)	Total Project Cost	SOURCES OF FINANCING			
		Business Loan Fund	Borrower	Bank	Other
Expansion/Repair					
Acquisition of Equipment					
Inventory Purchase					
Working Capital					
Other					
<b>TOTAL</b>					

**COLLATERAL SUMMARY**

	Description (please include specific detail)	Fair Market Value
Building & Land		
Equipment/Machinery		
Autos/Trucks		
Furniture & Fixtures		
Accounts Receivable		
Inventory		
Other		
<b>TOTAL</b>		

**INDEBTEDNESS**

Furnish the following information on installment debts, contracts, notes, and mortgages payable (present balance should agree with latest business balance sheet submitted).

To Whom Payable	Original Amount	Original Date	Present Balance	Rate of Interest %	Maturity Date	Monthly Payment	Security	Current or Past Due

**LOAN FEES**

\$250.00 upon Loan Closing

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I authorize Lender to make inquires as necessary to verify the accuracy of the statements made and to determine my credit worthiness. I certify the above information and statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

By: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

By: \_\_\_\_\_



**Section 3. Stocks and Bonds.** (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed).

Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

**Section 4. Real Estate Owned.** (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed).

	Property A	Property B	Property C
Type of Property			
Name & Address of Title Holder			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			

**Section 5. Other Personal Property & Other Assets.**

(Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and if delinquent, describe delinquency).

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**Section 6. Unpaid Taxes.** (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches).

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**Section 7. Other Liabilities.** (Describe in detail).

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**Section 8. Life Insurance Held.** (Give face amount and cash surrender value of policies – name of Insurance company and beneficiaries).

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I authorize Lender to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE Statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S.C. 1001).

Signature:	Date:	Social Security Number:

**PERSONAL FINANCIAL STATEMENT**

I (we) understand that the following questions are addressed to me (us) and I (we) have answered them as appropriate.

Yes      No

- \_\_\_    \_\_\_    1. Are you named as beneficiary of a trust, will, or estate?
- \_\_\_    \_\_\_    2. Are any of the assets listed herein held under a trust agreement of any type, held in an estate, or any other name or capacity? Please detail in "Additional Remarks" below.
- \_\_\_    \_\_\_    3. Are any of the assets listed herein on deposit, located, or otherwise held outside the United States of America?
- \_\_\_    \_\_\_    4. Do any of your assets secure any debts that have not been reported on the following schedules?
- \_\_\_    \_\_\_    5. Are any of the assets listed herein located in the community property states of Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, or Washington?
- \_\_\_    \_\_\_    6. Are any of your real estate properties used by you in your business?
- \_\_\_    \_\_\_    7. Have you ever filed for personal bankruptcy, had property you owned foreclosed, or made a settlement or an assignment for the benefit of creditors?
- \_\_\_    \_\_\_    8. Has any corporation or partnership in which you are (were) a major owner or a general partner ever filed bankruptcy, had property it owned foreclosed, or made a settlement or assignment for the benefit of creditors?
- \_\_\_    \_\_\_    9. Are you, or any corporation or partnerships in which you are a major owner or general partner, a party to any suit or legal action, or are there any unsatisfied judgments against you?
- \_\_\_    \_\_\_    10. Personal income tax returns have been filed through 20\_\_\_. Are any income tax returns, whether personal or that of any corporation or major partnership that you are a major owner of or a general partner, currently being audited or contested?
- \_\_\_    \_\_\_    11. Are you an officer, director, or principal shareholder of a financial institution?
- \_\_\_    \_\_\_    12. Are you a U.S. Citizen?

I (we) have explained fully under "Additional Remarks" on this page (or an attachment) my (our) "Yes" answers to the foregoing questions.

**Additional Remarks**

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Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_