

Credit Application & Financial Profile

Applicant (Principal Borrower)

Name: (first) _____ (middle) _____ (last) _____

Home Address: _____ Apt. No. _____

City: _____ State: _____ Zip: _____ Years & Months at that address: _____

Phone Home: _____ Work: _____ Mobile: _____

Social Security No: _____ Date of Birth: ____ / ____ / ____

Drivers License No: _____ State of Issue: _____

Marital Status: Married Married If Married, Spouse Name: _____

email address: _____

Co-Applicant (Co-Borrower)

Name: _____

Home Address: _____ Apt. No. _____

City: _____ State: _____ Zip: _____ Years & Months at that address: _____

Phone Home: _____ Work: _____ Mobile: _____

Social Security No: _____ Date of Birth: ____ / ____ / ____

Drivers License No: _____ State of Issue: _____

Relationship to Applicant: _____

Marital Status: Married Married If Married, Spouse Name: _____

email address: _____

Business / Employment Information

Please Check One: Sole Proprietor Partnership Corporation Limited Liability Company
 Limited Partnership Joint Venture Trust Employee: _____

Will the loan be in a Business name?: Yes No Business Name if different than below : _____

Business Name/ Employer: _____

Type of Business/ Employer: _____ Is this a new business? YES NO

Business/ Employer Address: _____ City: _____ State: _____ Zip: _____

Permanent Mailing Address: _____ City: _____ State: _____ Zip: _____

Other Business Locations, if any: _____

Federal Tax ID No: _____ Organizational ID No: _____

Officer _____ Title _____

Borrower Initials: _____ Co-Borrower Initials: _____

Financial Profile

Assets	In US Dollars	Liabilities	In US Dollars
Cash: Include checking, savings, CDs, Money Market Funds (Schedule 1)		Notes Payable – Unsecured (Schedule 10)	
Investments: Marketable Securities (Schedule 2)		Notes Payable – Secured (Schedule 10)	
Investments: Closely held companies/Non-marketable securities (Schedule 3)		Real Estate Mortgage Owning-Personal (Schedule 5)	
Accounts and Notes Receivable, undrawn earnings (Schedule 4)		Real Estate Mortgage Owning-Investment (Schedule 6)	
Real Estate: Personal (Schedule 5)		Installment Loan (Schedule 10)	
Real Estate: Investment (Schedule 6)		Credit Balances: Credit Cards/lines (Schedule 11)	
Retirement Accounts(Schedule 7)		Home Equity Line	
Automobile		Accrued Income Tax	
Life Insurance Cash Value (Face Value \$ _____) (Schedule 8)		Other Liabilities	
Equity in partnerships/private owned businesses (Schedule 9)			
Other Assets (Itemize & attach additional pages as needed)			
		Total Liabilities	\$
Total Assets	\$	Net Worth (Total Assets Minus Total Liabilities)	\$

The asset and liability sections should only be completed jointly by co-applicants if their assets and liabilities are sufficiently joined so that the statement can be meaningfully and fairly represented on a combined basis; otherwise, separate statements and schedules are required.

Annual Sources of Income**

Applicant

Co-Applicant

	Applicant	Co-Applicant
Salary (amount reported on W-2) or Professional Net Income	\$	\$
Bonus & Commissions		
Interest & Dividends		
Business Income or Loss		
Other (Itemize and attach additional pages as needed)		
Total Annual Income	\$	\$

**Complete Co-Applicant information only if financial statement is to apply for or maintain secured/joint credit

Monthly Expenses**

Applicant

Co-Applicant

	Applicant	Co-Applicant
Real Estate Mortgage Payments: Personal (Schedule 5)	\$	\$
Investment (Schedule 6)		
Notes Payable (Monthly) (Schedule 10)		
Credit Payments: Credit Cards/ Lines (Schedule 11)		
Home Equity Line		
Lease Payments (Schedule 12)		
Savings (Include Retirement Plans, IRA, & Keogh accounts)		
Taxes (Estimated income & property taxes)		
Miscellaneous (Living expenses, insurance, premiums, education, medical expenses, etc.)		
Other (Itemize & attach additional pages as needed)		
Total Monthly Expenses	\$	\$

Borrower Initials: _____ Co-Borrower Initials: _____

SCHEDULES

Please indicate ownership of assets or liabilities in last box: "A" for Applicant. "C" for Co-Applicant, "J" for Joint.

Schedule 1 – CASH: Checking, Savings, CDs, Money Market Funds

Financial Institution	Title of Account	Type of Account	Amount	A, C or J

Schedule 2 – INVESTMENTS: MARKETABLE SECURITIES (Registered and Traded: Stocks, Bonds, and Mutual Funds)

Description of Security	Registered Owners	No. of Shares	Book Value	Where Pledged	A, C or J

Schedule 3 – INVESTMENTS: Closely Held Companies/Non-Marketable Securities

Description of Security	Registered Owners	No. of Shares	Book Value	Where Pledged	A, C or J

Schedule 4 – ACCOUNTS & NOTES RECEIVABLE, UNDRAWN EARNINGS

Date of Account or Note	Due From	Original Amount	Present Balance	Repayment Terms	Security Held, if any	A, C or J

Schedule 5 – REAL ESTATE: Personal

Address	Title in Name of	Sales Price	Market Value	Mortgage Balance	Monthly Payment	A, C or J

Schedule 6 – REAL ESTATE: Investment

Address	Title in Name of	Sales Price	Market Value	Mortgage Balance	Monthly Payment	Rental Income	A, C or J

Borrower Initials: _____ Co-Borrower Initials: _____

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Schedule 7- Retirement Accounts: Pension, 401(k), IRAs

Name of Institution where Held	Title of Account	Type of Account	Percent Vested	Market Value	A,C or J

Schedule 8 – INSURANCE: Life, Disability, Malpractice

Insurance Company	Policy Owner/ Name of Insured	Beneficiary	Policy Face Amount	Cash Surrender	Policy Loans	Premium Payments	Where Assign'd	A,C or J

Schedule 9 – EQUITY IN PARTNERSHIPS/PRIVATELY OWNED BUSINESS(ES)

Business Name & Address	Form of Ownership	Nature of Business	Date of Investment	% of Ownership	Estimated Market Value of Investment	A,C or J

Schedule 10 – NOTES PAYABLE & INSTALLMENT LOANS: Unsecured, Secured

Owed to (Account Number)	Balance Amount	Payment	Frequency/ Maturity	Terms	Secured By	A,C or J

Schedule 11 – CREDIT ACCOUNTS: Credit Cards, Credit Lines, Home Equity Line

Issuer & Account Number	Credit Limit	Current Balance	Monthly Payments	Secured By	A,C or J

General Information

	Applicant		Co-Applicant	
Have you had property foreclosed upon or given title or deed in lieu?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you or your business a party any suit of legal action?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you presently subject to any unsatisfied judgments or tax liens?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have you ever declared bankruptcy?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Are you a US Citizen?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you have any unpaid taxes?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have you ever been convicted of a crime (misdemeanor C excluded?)	YES <input type="checkbox"/>	NO <input type="checkbox"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>

Borrower Initials: _____ Co-Borrower Initials: _____

Explanation for any questions marked "YES" (except for US Citizen) : _____

For the purpose of requesting a loan through Streamline Funding Group, LP I/we submit above the statement of my/our financial condition as of date indicated above. In consideration of the premises, I/we agree to notify Streamline Funding Group, LP of any changes affecting my/our financial responsibility and will at any time upon request furnish Streamline Funding Group, LP a then current statement of my/our financial condition, and statement to be in such form as required by Streamline Funding Group, LP.

I/We certify as a basis for credit that, to the best of my/our knowledge and belief, the information furnished and all representations made herein constitute the true and correct statement of my/our financial condition; that I/we have no assets or liabilities other than as shown on this statement; that all my/our assets are free to lien assignment except as shown herein and that there are no judgments outstanding or suits pending against me/us. I/We hereby authorize Streamline Funding Group, LP to verify any and all information provided by me/us and hereby authorize any creditor to verify any information herein.

In connection with my application for loan services from Streamline Funding Group, LP, I hereby authorize said company and any authorized agent acting on its behalf to prepare an investigative report on my background, including, but not limited to: my personal credit history, criminal background, and any personal financial history. I therefore authorize, request and require any persons or institutions contacted to furnish Streamline Funding Group, LP or its agents any information they have concerning any criminal and/or motor vehicle conviction records, credit worthiness, credit standing and credit capacity, general reputation and character. As an inducement to provide this information, I hereby release and forever discharge each and every such person or institution from any and all claims of liability, in law or in equity that may arise out of furnishing such information to Streamline Funding Group, LP or any authorized agent of that company. I may, upon written request, receive further information as to the nature and scope of such investigation. Any inquiries are to be directed to the agency/company as listed in the two preceding paragraphs. My signature below indicates my understanding and acceptance of all the above terms and stipulations.

Applicant Printed Name

Co-Applicant Printed Name

Applicant Signature

Date

Co-Applicant Signature

Date

Return completed Application to:

**Streamline Funding
Attn: Processing
Via Fax or Email
(512) 250-2085 - Fax
streamline@streamlinefunding.com**