



**COMMUNITY FUTURES CHINOOK, THE TOWN OF TABER AND  
THE MUNICIPAL DISTRICT OF TABER  
LOAN AND GRANT PROPOSAL**

Client Name (s):	
Business Name:	
Address:	
Phone No:	

Length of time at location: \_\_\_\_\_ Landlord: \_\_\_\_\_

Do you have a lease? Yes \_\_\_\_\_ No \_\_\_\_\_ Length of lease: \_\_\_\_\_

If no, please describe rental agreement: \_\_\_\_\_

\_\_\_\_\_

**Project Description:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please list the details of the project as follows:**

<b>PROJECT DESCRIPTION</b> i.e. Painting 2 walls	<b>ESTIMATED MATERIAL COST</b> i.e. 10 gal at \$30 each (\$300)	<b>ESTIMATED LABOUR COSTS</b> 10 hours at i.e. \$15/hour (\$150)	<b>ESTIMATED COMPLETION DATE</b> i.e. June 2007	<b>OTHER COMMENTS</b>
	Total material cost :	Total labour cost:		Total cost:

Quotations valid until: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

# APPLICATION FOR CREDIT



BUSINESS NAME: _____	INCORPORATED: _____	CONTACT: _____
ADDRESS: _____	CO-OPERATIVE: _____	POSITION: _____
CITY: _____ POSTAL CODE: _____	PARTNERSHIP: _____	Phone: BUS: _____
	PROPRIETORSHIP: _____	RES: _____
		e-mail: _____

## DESCRIBE TYPE OF BUSINESS, PRODUCTS, SERVICES, MARKETS

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

## HISTORY OF BUSINESS:

BUSINESS #: \_\_\_\_\_ BUSINESS START DATE: \_\_\_\_\_  
LEGAL NAME: \_\_\_\_\_

APPLICATION FEES: (NON-REFUNDABLE)

## OWNERSHIP

FULL NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ POSITION: \_\_\_\_\_ # OF SHARES OR % INTEREST \_\_\_\_\_

FULL NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ POSITION: \_\_\_\_\_ # OF SHARES OR % INTEREST \_\_\_\_\_

DESCRIBE PROJECT TO BE FINANCED: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

LOCATION OF BUSINESS: \_\_\_\_\_

EXPECTED JOBS TO BE CREATED: \_\_\_\_ F.T. \_\_\_\_ P.T. \_\_\_\_ SEASONAL # EMPLOYEES: \_\_\_\_ F.T. \_\_\_\_ P.T. \_\_\_\_ SEASONAL

## ESTIMATED PROJECT COSTS

PAINTING ..... \$ \_\_\_\_\_  
FLOORING ..... \$ \_\_\_\_\_  
SHELVING ..... \$ \_\_\_\_\_  
LIGHT FIXTURES ..... \$ \_\_\_\_\_  
SIGNAGE ..... \$ \_\_\_\_\_  
OTHERS ..... \$ \_\_\_\_\_  
TOTAL \$ \_\_\_\_\_

## EXPECTED FINANCING

CHINOOK LOAN ..... \$ \_\_\_\_\_  
GRANT ..... \$ \_\_\_\_\_  
CLIENT ..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
..... \$ \_\_\_\_\_  
TOTAL \$ \_\_\_\_\_

BANK: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_

## WHAT OTHER LENDERS HAVE BEEN APPROACHED FOR THIS FINANCING, AND WITH WHAT RESULTS?

Banking Institution: \_\_\_\_\_ Financial Officer: \_\_\_\_\_

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

☐ This lending program not offered by other financial institutions  
OR

Notice of Lender Decline: ☐ letter; ☐ fax; ☐ e-mail; ☐ confirmed by phone

I HEREBY AUTHORIZE OUR BANK TO DISCLOSE ALL INFORMATION CONCERNING OUR AFFAIRS TO THE COMMUNITY FUTURES CHINOOK LIKEWISE AUTHORIZED TO DIVULGE INFORMATION CONCERNING OUR AFFAIRS IN RESPONSE TO NORMAL CREDIT INQUIRIES FROM TRADE AND OTHER CREDITORS. COMMUNITY FUTURES CHINOOK MAY MAKE A BRIEF ANNOUNCEMENT OF ANY LOAN WHICH IT MAY SUBSEQUENTLY AUTHORIZE.

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

## Personal Statement of Affairs

Full Name:		Home Phone: _____		Work Phone: _____	
S.I.N.		Fax Phone: _____		Cell Phone: _____	
Birth Date: Day ____ Month ____ Year ____		E-mail: _____			
<input type="checkbox"/> Single <input type="checkbox"/> Common-Law <input type="checkbox"/> Widowed <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated					Dependants:
Present Address:			City	Province	Postal Code
					How Long?
Previous Addresses in the past 5 years (use reverse if necessary):					
Present Employer:		Position:	Work #:	Mo. Income:	How Long?
Previous Employer (s) in the past 5 years:					
Spouse's Name:		Birth Date: Day ____ Month ____ Year ____			
S.I.N.					
Spouse's Employer:		Occupation:	Work #:	Mo. Income:	How Long?
Spouse's Previous Employer					
Source of other Income:					
Relative: Name		Address:		Relationship:	Phone #:
Relative: Name		Address:		Relationship:	Phone #:
Relative: Name		Address:		Relationship:	Phone #:
LandLord:			Phone #:	Rent Payment:	
INSURANCE: Do you need life insurance? <input type="checkbox"/> Yes <input type="checkbox"/> No		If no, please state name of Insurance Company and Life Agent: Company Name: _____ Life Agent: _____			

# Personal Statement of Affairs

What You Own (List and Describe All Assets)		What You Owe		
DESCRIPTION	CASH	COMPANY	TOTAL OWING	PAYMENT (MONTH)
Cash on Hand/Deposit:		Credit Cards:		
Bank or Trust:				
Name:				
Name:				
RRSP's Where?				
Stocks, Bonds, Etc.:				
Vehicles (Describe with Year and Model)I		Bank Loans		
1)		1.		
2)		2.		
3)		3.		
4)		4.		
5)		5.		
Other Assets		Other Liabilities (Parents, Co-signer, Legal Claims, etc.):		
Real Estate: 1.		Mortgage(s):		
2.				
		Monthly Rent Payable:		
Household (insured value):		Taxes Owing (please specify):		
Life Insurance (value):		Revenue Canada		
		Other (please describe):		
<b>Total Assets:</b>		<b>Total Liabilities (add O/S column):</b>		
<b>NET WORTH = \$ _____ (NET WORTH = Total Assets – Total Liabilities)</b>				
I here by certify that the information provided is correct and permission is hereby granted for Entre-Corp Business Development Centre Ltd. to conduct a credit investigation.				
Signature _____		Date _____		
Signature _____		Date _____		

Additional Information that you feel may be applicable (include contingent liabilities), please add to the back of this form.

## LOAN APPLICATION CHECKLIST

Community Futures Chinook will require the following information or documents in order to process your loan application and reach an informed decision:

### New Businesses:

- ☐ A personal resume of company principles
- ☐ **Personal Statement of Affairs** of principles and if applicable, from Guarantor(s)
- ☐ **Loan application form**
- ☐ **Financial Projection**
- ☐ Copy of company incorporation/registration
- ☐ **Project Description**
- ☐ Estimates (if applicable)
  - renovations
  - equipment
  - building/construction
- ☐ Other \_\_\_\_\_

### If An Existing Business:

- ☐ **Financial statements/Tax Return for the last year.**
- ☐ **Personal Statement of Affairs of principles** and if applicable, from Guarantor(s)
- ☐ **Loan application form**
- ☐ Loan application fee (non-refundable)
- ☐ **Project Description**
- ☐ Estimates (if applicable)
- ☐ Aged list of Accounts Receivable and Accounts Payable
- ☐ Copy of Lease Agreement (if applicable)
- ☐ GST Number
- ☐ Other \_\_\_\_\_

.....

### In order to process an APPROVED application, the following may be required:

- ☐ Verification of personal investment
- ☐ If the loan is to an individual or partnership, copies of your birth certificate(s) are required. (Citizenship Document or Passport)
- ☐ Lease agreement (if applicable)
- ☐ Copy of trade certificate (if applicable)
- ☐ Copy of company incorporation/registration
- ☐ Provincial/Municipal license
- ☐ A comprehensive list of all equipment owned & to be purchased, including serial #'s
- ☐ Assets used as security require proof of ownership (i.e., copies of registrations or bills of sale)
- ☐ Other \_\_\_\_\_