

Non-Profit Organization Information Sheet

Please provide all relevant information.

Loan Amount Information

Loan Request Type: ☐ Credit Card ☐ Term Loan ☐ Line of Credit			
Loan Amount Requested	\$	Is board action necessary for this loan request?	☐ No ☐ Yes
Is congregation approval necessary for this loan request?	☐ No ☐ Yes	Is higher authority necessary for this loan request?	☐ No ☐ Yes

General Information

Name of Organization					
Physical Street Address of Organization (no PO Boxes)					
City		State		Zip	
Name of Primary Contact				Phone Number	
Tax Identification Number				Year Organization formed	
Legal Structure of Organization					
Annual Contribution to Sponsor/Support Body	\$				
Person(s) in charge of local financial-related decisions					
Person(s) in charge of other Organization decisions					

Financial Information

Current Operating Budget	\$
Actual Operating Income	\$
Membership/Service Area	
Income Sources	Please describe in detail and attach
Is the Non-Profit Organization currently past due on any financial obligations?	☐ No ☐ Yes – Please attach explanation
Has the Non-Profit Organization been past due on any financial obligations in the past three (3) years?	☐ No ☐ Yes – Please attach explanation

Additional Information Needed – Please Include Documents

- Financial Information – Last 3 Years of Financials for the Non-Profit Organization
- Most recent interim financial statements
- Operating budget projections for the next three (3) fiscal calendar years
- List and Resume of staff
- List and Resume of Board Members
- History of the organization

****Complete sections below for all loan requests excluding credit card requests.****

Project Information

Description of current project			
Name of Contractor		Status of Project (Planning, permitting, etc.)	
Estimated costs of project		Estimated construction time	
Cash available for project	\$	Special fundraising for this project	☐ No ☐ Yes – Please attach explanation

Property Information

Street Address of Property				
City		State	Zip	County
Acreage		Square footage of facility		
Purchase Date		Purchase Price		
Insurance coverage information	Please Include Insurance Coverage	Current mortgage holder		

Please provide a description of any improvements made to the property since date of purchase (include dates & costs):

Appraisal Information

Date of Appraisal		Appraisal Value	
Name of Appraiser			