



LOAN APPLICATION

PUBLIC DISLCOSURE: Borrower acknowledges that certain terms and conditions, as shown within Loan Documents, may be subject to public disclosure requirements and as such may be disclosed to the public through various means. This is required pursuant to certain rules, regulations and statutes to which Lender is, or may be, subject in accordance to Lender's legal organization under IRS Code 501(c)(3).

APPLICANT INFORMATION

Name: _____

Address: _____

Tax ID: _____ DUNS #: _____

Contact Name: _____ Phone #: _____

Alt Phone #: _____ Email: _____

Signature: _____ Date: _____

Title: _____

PROJECT INFORMATION

Name: _____ Est. Start Date: _____

Address: _____

County: _____

Requested Loan Amount: \$ _____

Requested Term: _____



PRELIMINARY PROJECT REVIEW

To assist Triple Bottom Line Foundation in evaluating your loan request and minimize your time spent preparing unnecessary documentation for your application, please provide us with the following information.

1. Brief written project narrative that details the following
 - a) What does the organization do? What is the population and geographic area served by the organization?
 - b) Name of building owners (with %), business owners (if different, with %), and property manager (if different).
 - c) Who will be obligated on the note?
 - d) Who will guarantee the note?
 - e) Name and addresses of other lenders/participants to the project
 - f) How will loan be repaid?
 - g) What do you anticipate pledging as collateral, if any?
 - h) List all company debts (include original and current amounts, origination and maturity dates, monthly payments)
3. Articles of Incorporation or Organization, Bylaws, and Membership or Management Agreement of the Borrowing entity.
4. 501(c)(3) determination letter (if not-for-profit).
5. Minutes or resolution indicating that Board has approved borrowing of the funds.
6. Organizational Financial Statements or Tax Returns to include:
 - a) Current Balance Sheet and Income Statement (within 2 months)
 - b) Two years Balance Sheets and Income Statements (audited, if available) and/or two years federal income tax returns
7. If historic operations do not cover the debt payment, then provide cash flow projections with assumptions.

Triple Bottom Line Foundation



Once we have reviewed your information, we will ask you to send any additional items applicable to your project to finalize our underwriting and submit your loan request to our loan committee for a final decision.

Feel free to contact us for assistance in preparing any items on this list.

Please provide an itemized total project budget and timeline along with which items will be paid for by the loan, and which will be paid for by others and/or the business:

Desired timeline: _____

Total Project Desired:

Item:	Amount:
_____	_____
_____	_____
_____	_____
_____	_____

Potential Sources of Funds:

Item:	Amount:
_____	_____
_____	_____
_____	_____
_____	_____

Triple Bottom Line Foundation is an equal opportunity provider.

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