



# LOAN APPLICATION

COMMUNITY FUTURES  
CROWSNEST PASS  
403.562.8858

BUSINESS NAME:	INCORPORATED: _____	CONTACT:
BUSINESS ADDRESS:	CO-OPERATIVE: _____	POSITION
EMAIL ADDRESS:	PARTNERSHIP: _____	PHONE #:
BUSINESS NUMBER:	PROPRIETORSHIP: _____	BUS #:
	WCB #	INCORPORATION #
		INCORPORATION DATE

**TYPE OF BUSINESS: (CHECK ALL THAT APPLY)**

- |                                     |                                    |  |   |
|-------------------------------------|------------------------------------|--|---|
| <input type="checkbox"/> HOME BASED | <input type="checkbox"/> RETAIL    | <input type="checkbox"/> AGRICULTURE   | <input type="checkbox"/> FULL TIME          |
| <input type="checkbox"/> START UP   | <input type="checkbox"/> SERVICE   | <input type="checkbox"/> MANUFACTURING | <input type="checkbox"/> PART TIME          |
| <input type="checkbox"/> EXISTING   | <input type="checkbox"/> OIL & GAS | <input type="checkbox"/> CONSTRUCTION  | <input type="checkbox"/> P.T JOB MAINTAINED |
|                                     | <input type="checkbox"/> FORESTRY  | <input type="checkbox"/> TOURISM       | <input type="checkbox"/> P.T JOB CREATED    |
|                                     |                                    |  | <input type="checkbox"/> F.T JOB MAINTAINED |
|                                     |                                    |  | <input type="checkbox"/> F.T JOB CREATED    |

(If applicable)

Business has been operating since:

Business fiscal year end is/will be:

Applicant has made best efforts to access funds from other sources without success.  \_\_\_\_\_ (Initial)

Reason(s) for rejection:

**ESTIMATED PROJECT COSTS**

LAND & BUILDING	\$	_____
EQUIPMENT	\$	_____
WORKING CAPITAL	\$	_____
INVENTORY	\$	_____
OTHER	\$	_____
<b>TOTAL</b>	<b>\$</b>	_____

**EXPECTED FINANCING**

CF LOAN	\$	_____
NEW INVESTMENT BY OWNERS		_____
		_____
OTHER SOURCE(S)	\$	_____
<b>TOTAL</b>	<b>\$</b>	_____

# Personal Statement of Affairs

Full Name: \_\_\_\_\_ Birth Date: Day/ Month/ Year/ \_\_\_\_\_  
 S.I.N. \_\_\_\_\_  
 Home: \_\_\_\_\_ Work: \_\_\_\_\_  
 Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**ARE YOU: (CHECK ALL THAT APPLY)**

- A CANADIAN CITIZEN
- ON A DISABILITY SUBSIDY
- IMMIGRANT/PERMANENT RESIDENT
- ON EMPLOYMENT INSURANCE
- ABORIGINAL
- DISABLED

**CURRENT MARITAL STATUS: (CHECK ONE)**

- SINGLE
- MARRIED
- DIVORCED
- COMMON LAW
- SEPARATED

DEPENDENTS:  YES  NO # \_\_\_\_\_

Present Address	City	Province	Postal Code	How Long?
Previous Address(s) in the past 5 years	City	Province	Postal Code	How Long?
	City	Province	Postal Code	How Long?

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. \_\_\_\_\_

Present Employer:	Occupation:	Work #:	Mo. Income:	How Long?
Previous Employer(s) in the past 5 years;				

Reference Name:	Phone #:	Relationship:	Mo. Income:	How Long?
Reference Name:	Phone #:	Relationship:	Mo. Income:	How Long?
Reference Name:	Phone #:	Relationship:	Mo. Income:	How Long?
Landlord:	Phone #	Address:		Rent Payment:

Do you have Life Insurance? \_\_\_\_\_ If so, please state: \_\_\_\_\_  
 \_\_\_\_\_ Company name \_\_\_\_\_ Life Agent: \_\_\_\_\_

## Personal Statement of Affairs

What You Own		What you Owe		
Description	Cash Value	Company	O/S Balance	Payments
Cash on Hand/Deposit:	\$	Credit Cards	\$	\$
Bank or Trust:				
Name:				
Name:				
Name:				
RRSP's Where?				
Stocks, Bonds, Etc.:				
Vehicles (describe with year and Model):	\$	Bank Loans	\$	\$
1.		1.		
2.		2.		
3.		3.		
4.		4.		
Other Assets	\$	Other Liabilities (Parents, Co-signer, Legal Claims, etc.)	\$	\$
Real Estate:		Mortgage(s):		
		Monthly Rent Payable:		
		Taxes Owing		
		Revenue Canada		
		Others		
<b>Total Assets:</b>	\$	Totals (Add O/S Colum):	\$	\$
		<b>Total Liabilities</b>	\$	
<b>NET WORTH = \$</b> _____ <b>(NET WORTH = TOTAL ASSETS – TOTAL LIABILITIES)</b>				

## STATEMENT OF INCOME & EXPENDITURES

Monthly Income		Monthly Expenses	
Employment Income	\$	Mortgage or Rent	\$
Other Income		Grocery Expenses	
		Insurance	
<b>Total Monthly Income</b>		Utilities	
		Transportation	
		Entertainment/Hobbies	
		Gas	
		Car Payment	
		Debt Payments	
		Other	
		Other	
		<b>Total Monthly Expenses</b>	\$

### ITEMS TO BE USED AS SECURITY FOR THE LOAN

Item description	Value	Serial Number	Owner	Available Equity for Security

#### Mortgage Information

Address 1:	Legal Description:
Current Value \$	P:                      B:                      L:
Address 2:	Legal Description:
Current Value \$	P:                      B:                      L:

#### Documents Checklist

- Completed Business Plan
- 1 Year Cash Flow Forecast
- Break-down of start up costs
- Information about assets you are purchasing
- Information about assets you will use to secure the loan
- Evidence of incorporation
- Evidence of personal income/household income
- Completed & Signed Loan Application

## Declarations

Have any of the applicant(s) ever had an asset repossessed? Yes  No

Have any of the applicant(s) ever declared for bankruptcy?  
(If Yes please list date discharged) \_\_\_\_\_ Yes  No

Is any of the applicant(s) party to any claims or lawsuits? Yes  No

Are you or any closely related individual or company involved in ANY legal action or litigation either personally or through your business? Yes  No

Do any of the applicant(s) owe any taxes prior to the current year? Yes  No

Do you owe any monies to Canada Revenue Agency? Yes  No

Are you related to any Director or Employee of this Community Futures Office? Yes  No

Applicant has made best efforts to access funds from other sources without success \_\_\_\_\_ Applicant's Initials \_\_\_\_\_

Name of Financial Institution applied to \_\_\_\_\_

Requested Loan Amount \_\_\_\_\_ Reason(s) for rejection: \_\_\_\_\_

The statements made herein are for the express purpose of obtaining financing from Community Futures Crowsnest Pass and are to the best of my knowledge and belief true and correct.

The applicant understands that additional information, if required in support of this application, must be supplied to the Community Futures Crowsnest Pass before consideration can be given to this application.

The applicant agrees to reimburse Community Futures Crowsnest Pass any legal costs incurred in the registration of documents for loan security. This amount may be added to your total loan amount and paid out first. Should the applicant withdraw his request for funds after legal documents have been registered and cost incurred, the applicant shall be responsible for these costs.

Application must be signed before it can be processed. Should the file require outside legal work, the client shall be responsible for the costs incurred. The foregoing information is submitted for the purpose of establishing or maintaining credit with Community Futures and is a true, full and correct statement of my financial condition on the date shown. I, the undersigned, declare that the statements made herein are for the purpose of obtaining business financing and are to the best of my knowledge complete and correct. By signing below I authorize Community Futures Crowsnest Pass to access information relevant to the loan application and subsequent loan monitoring; this includes contacting lenders, accountants, lawyers, etc.

-----  
Signature

\_\_\_\_\_  
Date

-----  
Signature

\_\_\_\_\_  
Date

# Information Collection Notice and Authorization Form

When you first become a client of Community Futures Crowsnest Pass (CFCNP), or when you apply to become a client, we will collect the information requested in this loan application and use it to:

- Confirm your identity
- Check your credit history
- Open an account with us
- Provide on-going services
- Enforce on our security if necessary

We may disclose your personal information:

- To a person who we are satisfied is requesting information on your behalf
- To other business units in Community Futures Crowsnest Pass to help serve you better
- To our Legal Counsel
- To a credit reporting agency
- When permitted or required by law
- To a public authority if, in our reasonable judgment, there appears to be an imminent danger which could be avoided by disclosing the information.

The gathering and disclosing of all information shall be governed by the provisions of the *Freedom of Information and Protection of Privacy Act*.

I hereby authorize Banks, Credit Agencies, and all Credit Bureaus to disclose all information concerning our affairs to Community Futures Crowsnest Pass and is likewise authorized to divulge information concerning our private affairs in response to normal credit inquiries from trade and other creditors. Community Futures Crowsnest Pass is authorized to release any or all information concerning this loan to any party or parties they deem fit, which may include a general news release to the public or otherwise.

All the information provided to Community Futures Crowsnest Pass in this Loan Application is true and current. I agree to and acknowledge all of the above terms. I have also read the above Information Collection Notice and give my consent for Community Futures Crowsnest Pass to collect and disclose my personal information in the matter stated above.

-----  
**Signature**

\_\_\_\_\_  
**Date**

-----  
**Signature**

\_\_\_\_\_  
**Date**

At times CFCNP will promote businesses in marketing and educational efforts. If you do not consent to CFCNP referring your business in these efforts, please check the box below.

I do not permit CFCNP to use my client information in marketing efforts and promotion material for CFCNP.