

Member Business Credit Request

- **Membership is required for loan approval.**
- **Please Complete in full. Missing information may contribute to delays in processing your application.**

Please fill out the form below, and email to Jeff Simpson by clicking the "Click Here to Submit Form" button on the second page. If your email client is not connected to Adobe Reader, save a copy of the completed document on your computer and email it as an attachment to jsimpson@umassfive.coop.

Amount Requested : \$ _____ **Term Requested :** _____ Application for:

Loan Purpose : _____ Business Term Loan

Commercial Real Estate Loan

Collateral Description : _____ Business Line of Credit

Market Value : _____ Other : _____

1. _____ \$ _____

2. _____ \$ _____

Member Business Information			
Legal Name of Member (Borrower)			
DBA (If Applicable)			Tax I.D. Number
Principal Place of Business Address (not P.O. Box)			
City	State	County	Zip
Mailing Address (If different)			
City	State	Zip	
Primary Contact Name		Business Telephone	Business Fax
Date Business Established	# of years under current ownership	State of Registration	Annual Sales \$
Describe Products/Services			Current Number of Employees
Type of Ownership (Select One)			E-Mail Address
<input type="checkbox"/> General Partnership <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Non Profit <input type="checkbox"/> Proprietorship <input type="checkbox"/> C-Corp. <input type="checkbox"/> S-Corp. <input type="checkbox"/> LLC <input type="checkbox"/> Professional Association			
Does applicant have any open deposits or loan accounts with Credit Union?		Business Share Draft Account with Credit Union	
<input type="checkbox"/> Yes <input type="checkbox"/> No			

Owner(s) Information			
Full Legal Name	Social Security Number	Percentage of Ownership	Title Currently Held
		%	
		%	
		%	
For more than three owners attach additional sheet(s).			

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Account Disclosures

Name of Institution or Broker	Type of Account	Account Number	Date Opened	Current Balance
Current Loans: Name of Lender	Rate	Collateral Description	Amount of Monthly Payment	Current Balance

For more than four loans use the Member Business Debt Schedule

Additional Information

Has applicant ever obtained credit under another name?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is applicant liable for debts not shown, including any contingent liabilities such as leases, endorsements, guarantees, etc?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Has applicant ever declared bankruptcy or had any judgments, garnishments, repossessions, or other legal proceedings filed against them?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is applicant currently a defendant in any suit or legal action?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are there any tax obligations, including payroll or real estates past due?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does any customer or supplier currently account for more than 20% of your business?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Once completed click the button below to submit your Member Business Credit Request, or save a copy of this document, and email it as an attachment to jsimpson@umassfive.coop

[Click Here to Submit Form](#)