

Business Solutions from Amplify

Your Best Resource for Loans, Expert Guidance, and Professional Support

Dear Business Owner,

Congratulations on taking the first step toward making your business dream a reality by applying for a business loan from Amplify. Not only are we experts in business loans, but we have also assembled a powerful network of professionals to share their insight and support with business owners like you.

Your dream of launching a business or expanding an existing enterprise requires powerful resources and experienced support. In particular, you need access to experts in financial services, SBA programs, legal issues, investing, and more. With knowledgeable guidance, you can boost your business' growth, avoid common missteps, and achieve your vision – easier, better, and faster.

Our extensive range of loan services is provided through a strategic partnership with the CU Business Solutions (CUBS) organization. Amplify offers business owners a wide variety of lending opportunities, such as loans for real estate purchase and refinance, equipment, or new business ventures. Through CUBS comprehensive loan services you will gain expert assistance every step of the way – from document preparation to payment scheduling. Whatever your vision is for a successful business, we can help make it a reality. We look forward to helping you succeed.

To take the next step toward securing a loan through Amplify, please complete the Business Loan Application and Personal Financial Statement forms along with the required documentation, then return them to the Amplify branch nearest you.

Best regards,

Amplify

512.836.5901

goamplify.com


Bank less. Live more.

BUSINESS LOAN APPLICATION



Each owner, shareholder, partner or member owning 20 percent or more interest in the business must sign a personal guaranty. A minimum of 1 guarantor is required regardless of percent ownership. Additional guarantees may be required.

13050 Pond Springs Rd - 2nd Floor, Austin, TX 78729
(512) 339-0911 (512) 336-2827 Fax

LOAN REQUEST

Loan Amount:

Amount Requested: \$ _____

Term: _____ Months Years

Purchase Price: \$ _____

(include copy of purchase order for equipment/vehicle purchases)

Loan Type:

- Term Loan
 Business Line of Credit
 SBA Loan
 Commercial Real Estate

Additional Information:

- This request is to: Refinance existing debt Purchase new equipment Manage seasonal cash flow shortages Purchase existing business
 Buy-out partner(s) Acquire Real Estate Letter of credit needs Refinance commercial real estate
 Other (describe): _____

LOAN PURPOSE & COLLATERAL

What are loan proceeds going to be used for: _____

Collateral Available*: _____

*Loans will be secured by all business assets unless specific assets, acceptable to the Credit Union, are pledged. Please describe fully any such specific assets that you wish to use as collateral. Please note which assets, if any are pledged as collateral for other loans. Please note location of collateral if different than your business location.

BUSINESS INFORMATION

Business Legal Name (exact legal name)

DBA (if applicable)

Taxpayer ID Number

Year Business Began Operation

Years Of Current Ownership

Years owners have been in this line of business

Annual Sales \$

- Business Type: INDIVIDUAL PARTNERSHIP CORPORATION OTHER
 Sole Proprietorship General Partnership Sub-S Corporation Nonprofit Organization
 Individual Limited Partnership C-Corporation Professional Association
 Limited Liability Partnership Limited Liability Company Other _____

Description of Business or Service

Primary Contact Name

Business Phone
()

Business Fax
()

BUSINESS PHYSICAL LOCATION (cannot be a P.O. box):

Street Address

City

State

Zip

BUSINESS MAILING ADDRESS (if different from above):

Street Address

City

State

Zip

FINANCIAL INFORMATION

Business Deposit Accounts

Financial Institution	Account Type	Current Balance	Average Balance	Would you like to move the deposit account?
		\$	\$	<input type="checkbox"/> Yes
		\$	\$	<input type="checkbox"/> Yes
		\$	\$	<input type="checkbox"/> Yes

Business Debts (List all business debts, including accounts and payables. Include any existing outstanding credit union debt.)

Payable to:	Type of Account (Revolving, Term, etc.)	Balance Owning	Payment	Pay off with proceeds?
		\$	per	<input type="checkbox"/> Yes
		\$	per	<input type="checkbox"/> Yes
		\$	per	<input type="checkbox"/> Yes
		\$	per	<input type="checkbox"/> Yes

RELATED BUSINESS ISSUES

(If Yes, please explain on separate sheet)

- Has the Business Applicant ever declared bankruptcy? Yes No If yes, Date of occurrence: _____
 Has any Principal, Guarantor or Co-applicant ever declared bankruptcy? Yes No If yes, Date of occurrence: _____
 Is the Business Applicant liable as guarantor or endorser on an existing or outstanding loan? Yes No If yes, Date of occurrence: _____
 Is any Principal, Guarantor or Co-applicant liable as guarantor or endorser on an existing or outstanding loan? Yes No If yes, Date of occurrence: _____
 Is the Business Applicant or any Principal, Guarantor or Co-Applicant a party to any legal claim or lawsuit? Yes No If yes, Date of occurrence: _____
 Is the Business already pledging any assets for a loan or lease? Yes No If yes, Date of occurrence: _____
 Is the Business Applicant or any Principal, Guarantor or Co-applicant currently past due on any taxes? Yes No If yes, Date of occurrence: _____
 Are there any tax liens filed against the Business Applicant, or any Principal, Guarantor or Co-applicant? Yes No If yes, Date of occurrence: _____

Does Business Applicant own or lease occupied building? Own Lease

If leased, name of lessor: _____

Mailing address of lessor: _____

Years remaining on lease: _____

Monthly lease payments, if applicable: \$ _____

Please complete all entries.

Submitted to: 13050 Pond Springs Road, 2nd Floor Austin, TX, 78729	Date:
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IMPORTANT: Read these directions before completing this Statement

If you are applying for individual credit in your own name and are relying on your own income, or assets and not the income or assets of another person as the basis for repayment of the credit requested, or if this statement relates to your guaranty of the indebtedness of other person(s), firm(s), or corporation(s), complete only Sections 1, 3, and 4.

If you are applying for individual credit but are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all Sections. Provide information in Section 2 about the person whose alimony, support, or maintenance payments or income or assets you are relying on. Alimony, child support, or separate maintenance income, need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.

Section 1 – Individual Information	Section 2 – Other Party Information
Name	Name
Address	Address
City, State & Zip	City, State & Zip
Social Security #	Social Security #
Date of Birth	Date of Birth
Position or occupation	Position or occupation
Business name	Business name
Business address	Business address
City, State & Zip	City, State & Zip
Length at present address	Length at present address
Length of employment	Length of employment
Res. Phone Bus. Phone	Res. Phone Bus. Phone

Have (either of) you or any firm in which you were a major owner ever declared bankruptcy, or settled any debts for less than the amounts owed? If yes, please provide details on a separate sheet. Yes No

Are (either of) you a defendant in any suit or legal action? Yes No

Are (either of) you presently subject to any unsatisfied judgments to tax liens? Yes No

When, if ever, have (either of) you been audited by IRS? Yes No Date:

Are (either of) your assets held in a Trust? Yes No If so, what type? Living Revocable Non-Revocable Other

Section 3 – Statement of Financial Condition as of:

Assets (Do not include assets of doubtful value)	\$ Amount (omit cents) [Individual]	\$ Amount (omit cents) [Joint]	If joint, with whom	Liabilities	In dollars (omit cents) [Individual]	In dollars (omit cents) [Joint]	If joint, with whom
Cash, Checking & Savings, CD's – see Schedule A	\$	\$		Notes payable to banks & others – see Schedule H	\$	\$	
U.S. Gov't & marketable securities – see Schedule B	\$	\$		Due to brokers	\$	\$	
Non-marketable securities – see Schedule B	\$	\$		Amounts payable to others – secured	\$	\$	
Securities held by broker in margin accounts	\$	\$		Amounts payable to others – unsecured	\$	\$	
Restricted, control or margin account stocks	\$	\$		Accounts & bills due	\$	\$	
Real estate owned – see Schedule D	\$	\$		Unpaid income tax	\$	\$	
Accounts, loans, & notes receivable	\$	\$		Other unpaid taxes & interest	\$	\$	
Automobiles	\$	\$		Real estate mortgages payable – see Schedules D & H	\$	\$	
Cash surrender value-life insurance – see Schedule E	\$	\$					
Vested interest in deferred compensation/profit-sharing plans – see Schedule F	\$	\$					
Business ventures – see Schedule G	\$	\$					
Other assets/personal property itemize – see Schedule G if applicable	\$	\$					
				Total Liabilities	\$	\$	
				Net Worth	\$	\$	
Total Assets	\$	\$		Total Liabilities & Net Worth	\$	\$	

SCHEDULE H – LOANS OWING BANKS, BROKERS, FINANCE COMPANIES, AND OTHERS (MASTERCARD, VISA, ETC.)

Owing to (Acct. No.)	Joint Y/N	Date of Original Borrowing/Amount	Present Balance	Due	Monthly Payment	Date of Final Payment	Secured by

The information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guaranty of the undersigned. The undersigned acknowledges and understands that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guaranty thereof. Each of the undersigned represents, warrants, and certifies that (1) the information provided herein is true, correct and complete and gives a correct and complete showing of the financial condition of the undersigned, (2) the undersigned has no liabilities direct, indirect or contingent except as set forth in this statement, and (3) legal and equitable title to all assets listed herein is in the undersigned's sole name, except as may be herein otherwise noted. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein, and to determine the credit-worthiness of the undersigned and the undersigned hereby authorizes all persons of whom you make such inquiries to respond thereto in full. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned.

 Signature (individual)

 Date

 Signature (joint)

 Date