



LOAN APPLICATION

SECTION 1

Applicant _____

Home Address _____ City _____ State _____ Zip _____ County _____ Home Phone _____

Home Email Address _____

Name of Business _____ Tax ID Number _____

Current Business Address _____ City _____ State _____ Zip _____ County _____ Business Phone _____

Type of Business or Industry _____ Date Established _____ Business Email _____ Web Address _____

Number of Employees _____ **IF CURRENT BUSINESS IS OUTSIDE THE CITY OF ATLANTA, PROVIDE NEW BUSINESS LOCATION HERE.**
 (Include Subsidiaries and Affiliates)

List Subsidiaries/Affiliates _____ New Business Address _____

Bank of Business _____ Bank Phone _____ City _____ State _____ Zip _____ County _____

Bank Address _____ City _____ State _____ Zip _____ Business Phone _____

SECTION 2

USE OF PROCEEDS	LOAN REQUEST (Enter Gross Dollar Amount Rounded to Nearest Hundreds)
Land/Building Acquisition	
New Construction/Renovation	
Acquisition of Machinery/Equipment	
Fixtures/Signage	
Inventory Purchase	
Working Capital (Including Accounts Payable)	
Acquisition of Existing Business	
All others	
Total Loan Requested (Input TOTAL)	
Terms of Loan Requested (For Use by IA Only)	

INVEST ATLANTA USE ONLY

BILF ____ CatIF ____

EZLF ____ OLF ____

PHX ____ 504 ____

OTHER: Indicate Below

Council District: _____

Interest Rate _____

Years _____

Monthly Pymt. _____

Annual Pymt. _____

SECTION 3

PREVIOUS IA OR OTHER GOVERNMENT FINANCING: If you, any principals or affiliates have ever requested Government Financing, complete the following:

Name of Agency	Original Amt of Loan	Date of Request	Approved or Declined	Balance	Current ? Yes or No

SECTION 4

Furnish the following information on all installment debt, contracts, notes and mortgages payable. Indicate by an asterisk (*) items to be paid by loan proceeds and reason for paying same (presented balance should agree with latest balance sheet submitted).

To Whom Payable	Original Amount	Original Date	Present Balance	Rate of Interest	Maturity Date	Monthly Payment	Security	Current ?
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		

MANAGEMENT (Proprietor, partners, officers, directors and all holders of outstanding stock – 100% OWNERSHIP MUST BE SHOWN). Use separate sheets if necessary. **(Application MUST be signed by all parties owning 20% or more of the company)**

Name _____ Phone # _____ Social Security # _____ - _____ - _____
 Address _____ City _____ State _____ ZipCode _____
 Email Address _____
 Ownership % _____ Race _____ Sex _____ Date of Birth _____

Name _____ Phone # _____ Social Security # _____ - _____ - _____
 Address _____ City _____ State _____ ZipCode _____
 Email Address _____
 Ownership % _____ Race _____ Sex _____ Date of Birth _____

Name _____ Phone # _____ Social Security # _____ - _____ - _____
 Address _____ City _____ State _____ ZipCode _____
 Email Address _____
 Ownership % _____ Race _____ Sex _____ Date of Birth _____

NOTE: This data is collected for statistical purposes only. It has no bearing on the credit decision to approve or decline this application.

ASSISTANCE: List the names(s) and occupation (s) of anyone who assisted in preparation of this form, other than applicant.

Name & Occupation	Mailing Address (complete)	Total Fee Paid	Fees Due
		\$	\$
		\$	\$

Signature of Preparer(s) if other than APPLICANT _____ If APPLICANT is a Proprietor or General Partner(s), sign here _____

If APPLICANT is a CORPORATION, sign here _____ DATE _____

CORPORATION NAME (AFFIX CORPORATE SEAL) _____ DATE _____

BY: _____ ATTESTED BY: _____
 Signature of President Signature of Corporate Secretary

I AUTHORIZE Invest Atlanta (IA), Atlanta’s Development Authority to obtain a credit report on me through the credit reporting agency of its choice. If any adverse credit decision is made due totally or partly to the information on the credit report, IA will identify the source of the credit report, so that I may contact them if I wish.

Name (Printed): _____ Name (Printed): _____ Name (Printed): _____
 Signature: _____ Signature: _____ Signature: _____
 Date: _____ Date: _____ Date: _____

SECTION 5

This checklist has been provided to assist you in gathering the necessary information for the *initial evaluation* of your loan request. COMPLETE information will be necessary to process your application. Forms are provided for items 1-10.

- 1. Loan Request Application Form
- 2. Management Resume: Provide complete resume(s) of all individuals including key managers (copy form as needed)
- 3. Personal Financial Statement - Complete this form for: (1) each proprietor, (2) each limited partner who owns 20% or more interest and each general partner, (3) each stockholder owning 20% or more voting stocks and each corporate officer and director or (4) other person(s) or entity (ties) providing a guaranty on the loan.
- 4. Two years Financial Projections (Start-ups)
- 5. 12 Months Cash Flow Projections (Start-ups and working capital loan requests)
- 6. Narrative assumption to Financial Projections and Cash Flow Analysis.
- 7. Complete the Sources and Uses Form (Include all NEW funds for the project)
- 8. Business Plan: Include a description of management, feasibility analysis, assumptions, site evaluation and marketing strategy
- 9. Interim Profit & Loss and Balance Sheet: Within 30-90 days old for business being 1) acquired, 2) existing/expanded and 3) affiliates (20% or more ownership interest by any of the owners/shareholders of proposed borrower)
- 10. Business Financial Statements and Tax Returns: Income statements, balance sheets and tax returns for three (3) prior years-end time periods for existing business and any affiliates.
- 11. Personal Tax Returns: Completed federal tax returns for the past three (3) years on each individual referenced to in #3 above (or signed extension).
- 12. Copy of Proposed Real Estate Purchase Agreement (IF APPLICABLE)
- 13. Uniform Franchise Offering Circular (IF APPLICABLE)
- 14. Copy of Proposed Franchise Agreement or Letter of Approval From Franchisor (IF APPLICABLE)
- 15. Copy of Existing or Proposed Lease Agreement (s) (IF APPLICABLE)
- 16. Two (2) estimates of equipment to be purchased (IF APPLICABLE)
- 17. At least two (2) different contractor estimates on construction projects (IF APPLICABLE)
- 18. List of inventory items to be acquired and list how working capital will be used (IF APPLICABLE).
- 19. Copy of Articles of Incorporation or Partnership Agreement for Corporation or Partnership.
- 20. If not a U.S. Citizen, please attach proof of resident alien status (PHOTOCOPY both sides of "Green Card").
- 21. Bank Decline or Commitment Letter(s).
- 22. Does the company or any owner have existing tax liens? Yes No (if **yes** please provide a written statement).
- 23. Other _____

All applicants are required to pay a non-refundable loan processing fee when submitting an application to Invest Atlanta, Atlanta's Development Authority. (See attached Schedule of Fees)

SECTION 6

ALL INFORMATION SHOULD BE SUBMITTED TO:
Invest Atlanta, Atlanta's Development Authority
133 Peachtree Street, Suite 2900
Atlanta, GA 30303
Telephone: 404/880-4100 Fax: 404/880-9333