



**RESOURCE CAPITAL**  
Real Estate Financing for Growing Businesses

1050 Iron Point Road  
Folsom, California 95630  
office 916.962.3669  
fax 916.962.1822  
email info@resourcecapital.com

**504 Real Estate Loan Application**

**Company Information**

Company name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Principal in charge \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

Secondary contact person \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_  
(IN-HOUSE CONTROLLER OR BOOKKEEPER)

Company website \_\_\_\_\_ email \_\_\_\_\_

Type of business \_\_\_\_\_ Date established \_\_\_\_\_

Type of entity (check one):     Proprietorship     Partnership     Corporation     LLC

**Company Ownership**

Name \_\_\_\_\_ Title \_\_\_\_\_ % of Ownership \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_ % of Ownership \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_ % of Ownership \_\_\_\_\_

If a corporation, please indicate who is President and Secretary

**Affiliate Businesses**

IF APPLICABLE

Name \_\_\_\_\_ Owner \_\_\_\_\_ % of Ownership \_\_\_\_\_  
(APPLICANT COMPANY OR INDIVIDUALS)

Name \_\_\_\_\_ Owner \_\_\_\_\_ % of Ownership \_\_\_\_\_  
(APPLICANT COMPANY OR INDIVIDUALS)

**Existing Business Locations**

Address \_\_\_\_\_ Square feet \_\_\_\_\_ Lease payment \_\_\_\_\_ Lease expiration \_\_\_\_\_  
Replaced by new facility?  Yes  No

Address \_\_\_\_\_ Square feet \_\_\_\_\_ Lease payment \_\_\_\_\_ Lease expiration \_\_\_\_\_  
Replaced by new facility?  Yes  No

**References**

Bank name \_\_\_\_\_ Acct. no. \_\_\_\_\_ Acct. officer \_\_\_\_\_ Phone \_\_\_\_\_

## Employee Questionnaire

Number of current employees \_\_\_\_\_ Estimated number of new employees within the next two years as a result of this project \_\_\_\_\_

### Key employees

Name	Title	Responsibilities	Years with company	Years in the industry

## Miscellaneous Questions

Have you or any officer of your company ever been involved in bankruptcy or insolvency proceedings? \_\_\_\_\_

Are you or your business involved in any pending or prior lawsuits? \_\_\_\_\_ *If yes, please provide details on a separate sheet.*

Have you ever received an SBA loan? \_\_\_\_\_ *If yes, please provide a copy of the SBA Loan Authorization Document and the following:*

Original Amount \$ \_\_\_\_\_ Date of the loan \_\_\_\_\_

Current Balance \$ \_\_\_\_\_ Status \_\_\_\_\_

## Checklist

PLEASE PROVIDE THE FOLLOWING DOCUMENTS AND INFORMATION

### Business information

<input type="checkbox"/>	Business financial statements for the last two years
<input type="checkbox"/>	Projections (if business is less than three years old)
<input type="checkbox"/>	Interim financial statement dated within the last 60 days
<input type="checkbox"/>	Business debt schedule (form attached)
<input type="checkbox"/>	Federal tax returns for the last two years
<input type="checkbox"/>	Articles of Incorporation, Amendments thereto, and By-Laws (if corporation)
<input type="checkbox"/>	Articles of Organization and Operating Agreement (if LLC)
<input type="checkbox"/>	Partnership Agreement (if partnership)
<input type="checkbox"/>	Business License <i>and</i> Fictitious Business Name Statement (if proprietorship)
<input type="checkbox"/>	Franchise Agreement

### Personal information (for each owner of 20% or greater)

<input type="checkbox"/>	Federal tax returns for the last two years
<input type="checkbox"/>	Personal Resume (form attached)
<input type="checkbox"/>	Personal Financial Statement (form attached)
<input type="checkbox"/>	Photocopy of driver's license/I.D. card

### Real estate information

<input type="checkbox"/>	Real Estate Purchase Agreement or settlement sheet
<input type="checkbox"/>	Construction cost budget and/or equipment invoices
<input type="checkbox"/>	Existing environmental studies
<input type="checkbox"/>	Preliminary Title Report

## Authorization to Release Information

I/We hereby authorize the release to EDF RESOURCE CAPITAL, INC. of any information they may require at any time for any purpose related to my/our credit transaction with them.

I/We further authorize EDF RESOURCE CAPITAL, INC. to release such information to any entity they deem necessary for any purpose related to my/our credit transaction with them.

I/We hereby certify that the enclosed information, including any attachments or exhibits provided herewithin or at a later date, is valid and correct to the best of my/our knowledge.

Name of applicant \_\_\_\_\_

Signature of applicant \_\_\_\_\_ Date \_\_\_\_\_

Name of applicant \_\_\_\_\_

Signature of applicant \_\_\_\_\_ Date \_\_\_\_\_

**Nature of Your Business**

Nature of your business \_\_\_\_\_

Type of products or services (include any catalogs or brochures) \_\_\_\_\_

Geographic market area \_\_\_\_\_

List key customers \_\_\_\_\_

List major competitors \_\_\_\_\_

**Project Information**

Street address of project \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

What is the square footage of the new building? \_\_\_\_\_ What is the square footage your company will occupy?\*

\* Please note — we require your company to occupy 51% of an existing building and initially 60% of a building to be constructed.

Escrow closing date \_\_\_\_\_ Realtor's name \_\_\_\_\_ Phone \_\_\_\_\_

If known, how will the property be vested (i.e. individually, husband and wife, partnership, LLC, corporation, trust ...) \_\_\_\_\_

Please provide appropriate documentation (i.e. Partnership Agreement, LLC documents, Articles of Incorporation, Trust Agreement ...)

**Total Project Costs****Purchase existing building**

Purchase price.....\$ \_\_\_\_\_

Improvements.....\$ \_\_\_\_\_

Equipment\* .....\$ \_\_\_\_\_

Other.....\$ \_\_\_\_\_

Total.....\$ \_\_\_\_\_

**Construction project**

Land acquisition.....\$ \_\_\_\_\_

Construction bid.....\$ \_\_\_\_\_

Architects, permits, other soft costs .....\$ \_\_\_\_\_

Equipment\* .....\$ \_\_\_\_\_

Other.....\$ \_\_\_\_\_

Total.....\$ \_\_\_\_\_

\* Please note — equipment to be financed must have a useful life of 10 years or greater.

**If there are any tenants that will remain in the building, please provide the following information:** Also, please have your realtor provide copies of all existing leases.

Tenant name	Square footage	Lease expiration	Rent amount