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FAITH BASED LOAN QUESTIONNAIRE

ORGANIZATIONAL INFORMATION

Name of Church:			
Denomination:	Date Founded:	Tax ID Number:	
Current address:			
City:	State:	ZIP Code:	
Phone #:	Length of Time at Location:	Own	Rent (Check One)
Central Organizational Body (Diocese, League, Conference, Synod, etc.):			
Does the central body provide financial support:			
If current facility is rented please provide monthly rental fee and maturity of lease:			

CLERGY / STAFF

Name of Head Clergyman:			
Length of time with organization:	Age:	Full Time	Part Time (Check One)
Other key staff, clergy or leaders:	<u>Name</u>	<u>Position</u>	

Who will be the primary contact for this request:

CONGREGATION INFORMATION

Size of total congregation:	
Number of giving units (defined as Family Units or Single Adults who give \$200 or more per year):	
Number of giving units 1 year ago:	Number of giving units 2 years ago:
Average Weekly Worship Attendance:	What % of congregation commutes more than 3 miles:
When was the membership database last purged:	Date of last member census:
Breakdown of members (% of Church Members)	Under 18:
	18 – 25:
	25 – 35:
	35 – 45:
	45 – 55:
	55 – 65:
	Over 65:

FINANCIAL INFORMATION

Annual budgeted giving:	Annual budgeted expenses:
Are you currently in a fundraising campaign:	Start Date: End Date:
Amount of pledges given:	Amount of pledges collected:
Anticipated final pledge collections:	Below please list the amounts given by the 10 largest givers:

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How many campaigns has the organization held in the past:	What has been the historic pledge collection %:
Who is managing the pledge campaign:	
Name of current Bank(s):	
Average annual depository balance:	What % of this balance is Unrestricted:
Who is in charge of banking decisions and statement reconciliation:	

LOAN REQUEST

Nature of request (Purchase, Construction, Remodeling, Refinance, etc):	
Amount of loan requested:	Amount of cash available for down payment:
Preferred amortization (in years):	Date funds will be needed:

EXISTING BUILDING INFORMATION (IF OWNED)

Address:		
Year constructed:	Year of last significant renovation:	Square feet:
Seating capacity:	Value:	Source (Appraisal, Assessor, Estimate, etc):
Is there a first lien against the property:	Balance:	Lender:
Interest Rate:	Monthly Payment:	Maturity Date:
Is there a second lien against the property:	Balance:	Lender:
Interest Rate:	Monthly Payment:	Maturity Date:

PROPOSED PROJECT (IF APPLICABLE)

Address:		
Project Budget:	Architect:	Builder:
Value after Project:	Source (Appraisal, Assessor, Estimate, etc):	
\$ spent on project to date :		

ALONG WITH THIS QUESTIONNAIRE PLEASE PROVIDE THE FOLLOWING INFORMATION

- A minimum of three years of financial statements
- Year-to-date financial statements
- If not included in financial statements, please provide a separate report detailing revenue sources (i.e. core contributions, campaign funds, mission funds, etc.)
- Provide a breakdown of each staff member's salary and other forms of compensation
- Provide a detailed list of expenses in the past three years that are deemed discretionary, in a format that can be related to the financial statements that were provided.
- Copy of current year's budget
- Copy of construction budget (If applicable)
- Updated report of pledges received and collected (If applicable)
- Copy of articles of incorporation / By-laws
- Copy of any existing financial commitments (If Applicable)
- Copy of architect or engineer plans (If Applicable)
- Copy of a construction budget, along with a list of preliminary project costs that have already been paid