



## FAITH BASED LOAN QUESTIONNAIRE

### ORGANIZATIONAL INFORMATION

Name of Church:			
Denomination:		Date Founded:	Tax ID Number:
Current Physical Address:			
City:	State:		ZIP Code:
Phone #:	Length of Time at Location:		Own      Rent
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
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:		
<b>LOAN REQUEST</b>		
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:	
<b>EXISTING BUILDING INFORMATION (IF OWNED)</b>		
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:
<b>PROPOSED PROJECT (IF APPLICABLE)</b>		
Address:		
Project Budget:	Architect:	Builder:
Value after Project:	Source (Appraisal, Assessor, Estimate, etc):	
\$ spent on project to date :		
<b>ALONG WITH THIS QUESTIONNAIRE PLEASE PROVIDE THE FOLLOWING INFORMATION</b>		
- 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 a 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		

If your application for business credit is denied, you have the right to a written statement of the specific reasons for the denial. To obtain the statement, please call us at 800-297-2837 or write us at: Union Bank & Trust; Attn: Commercial Loan Department; PO Box 82535; Lincoln, NE 68501 within 60 days from the date you are notified of our decision. We will send you a written statement of reasons for the denial within 30 days of receiving your request for the statement.

Notice: The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The Federal agency that administers compliance with this law concerning this creditor is FDIC Consumer Response Center; 1100 Walnut St, Box #11; Kansas City, MO 64106.