

**Religious Organization  
Loan Application  
Minimum Loan Amount \$1,000,000**

Name of Organization: \_\_\_\_\_

Primary Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Tax ID: \_\_\_\_\_

Email: \_\_\_\_\_

Web Address: \_\_\_\_\_

**PURPOSE OF LOAN**

**Amount**

Refinance Existing Debt: .....

\_\_\_\_\_

Finance Property Acquisition: .....

\_\_\_\_\_

Building Improvements / Repairs / Expansion: .....

\_\_\_\_\_

Construction of New Facility: .....

\_\_\_\_\_

Revolving Line of Credit for: \_\_\_\_\_

\_\_\_\_\_

**TOTAL LOAN REQUEST:**

\_\_\_\_\_

**GENERAL INFORMATION**

Date your Organization was founded: \_\_\_\_\_ By Whom: \_\_\_\_\_

Denomination (if any): \_\_\_\_\_

Current number of people in Congregation: \_\_\_\_\_

Length of time at your present location: \_\_\_\_\_ Est. value of property: \_\_\_\_\_

Senior Pastor: \_\_\_\_\_ Since: \_\_\_\_\_

Number of Staff Members: \_\_\_\_\_ Number of Associate Pastors: \_\_\_\_\_

Names of Corporate Officers: \_\_\_\_\_

\_\_\_\_\_

Brief Property Description: \_\_\_\_\_

\_\_\_\_\_

Number of active volunteers: \_\_\_\_\_ Number on Board of Directors: \_\_\_\_\_

Names of Board Members: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is Board action necessary to approve loan?  Yes  No

Is Congregation's approval necessary?  Yes  No

Do you have a Capital Campaign?  Yes  No If Yes, Start Date: \_\_\_\_\_

Did you use a Professional Fundraiser?  Yes  No If Yes, Whom: \_\_\_\_\_

What is length of Campaign: \_\_\_\_\_ How much are you planning to raise? \_\_\_\_\_

### **CURRENT BANKING RELATIONSHIP**

Name of Current Bank: \_\_\_\_\_

Bank Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Existing Loan Amount: \_\_\_\_\_ Rate: \_\_\_\_\_ Maturity: \_\_\_\_\_

Average Deposits: \_\_\_\_\_ Average Investable Balances: \_\_\_\_\_

### **ATTENDANCE AND MEMBERSHIP INFORMATION**

Year ..... 20\_\_\_\_ 20\_\_\_\_ 20\_\_\_\_

Number of Adult Members: ..... \_\_\_\_\_

Avg. Weekly Adult Attendance: ..... \_\_\_\_\_

Preschool / School Enrollment: ..... \_\_\_\_\_

Worship Services per Week: ..... \_\_\_\_\_

Percentage of your present Congregation in each of the following age groups:

0-18 Years: \_\_\_\_\_ 19-30 Years: \_\_\_\_\_ 31-65 Years: \_\_\_\_\_ Over 65 Years: \_\_\_\_\_

When did you last update your Membership Roll? \_\_\_\_\_

Anything else you would like us to know? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CREDIT HISTORY**

Excellent – Pays all Bills on Time

Good – Pays Mortgage On Time

Fine – A few late Mortgage Payments

Not so Good – Recent Late Payments

Help – Pending Foreclosure

Credit Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SUBJECT PROPERTY INFORMATION**

Subject Property Address: \_\_\_\_\_

Year Church Built: \_\_\_\_\_ Purchase Date: \_\_\_\_\_ Purchase Price: \_\_\_\_\_

# of Buildings: \_\_\_\_\_ Total Sq. Feet: \_\_\_\_\_ Lot Size: \_\_\_\_\_

**HOW WILL LOAN BENEFIT YOUR CONGREGATION**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**DISCLOSURE**

Alliance Business Capital is a Commercial Loan Intermediary specializing in Commercial Real Estate Loans. Alliance relies on our Religious Lending Partners for all Underwriting Decisions. Our Religious Lending Partners consist of Banks, Credit Unions as well as some Non-Banking Firms. Alliance will charge you a Commercial Loan Fee which has not yet been determined but typically runs from 1 to 3% of the Final Loan Amount. This Fee is not payable unless your Loan Request actually closes. The exact amount of the Commercial Loan Fee to Alliance will be disclosed in an Engagement Letter once we have had the opportunity to review a complete Loan Package. There is no Fee due with this Application.

**AUTHORIZATION**

Your signature below indicates that you have the authority to act on behalf of your Congregation. Your signature also authorizes Alliance Business Capital the right to share the information in this Loan Application as well as all subsequent documents submitted to Alliance with an Alliance Religious Lending Partner(s) as deemed necessary by Alliance.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## **RELIGIOUS ORGANIZATION DOCUMENTS NEEDS LIST**

In order to process your loan request, we will need the below applicable documents.

- |  |  |
|--|--|
| <input type="checkbox"/> Purpose of Loan Request   | <input type="checkbox"/> History of Organization                       |
| <input type="checkbox"/> Articles of Incorporation   | <input type="checkbox"/> By-Laws                                       |
| <input type="checkbox"/> IRS 501(c) (3) Tax Exempt Determination   | <input type="checkbox"/> Most recent 3 years financial statements      |
| <input type="checkbox"/> Current Year to Date financial statement  | <input type="checkbox"/> Copy of current budget                        |
| <input type="checkbox"/> List of 15 largest contributors (current FYE)   | <input type="checkbox"/> List of the members of the Board of Directors |
| <input type="checkbox"/> Appraised value of Property (if available)  | <input type="checkbox"/> Any facility/equipment lease agreements       |
| <input type="checkbox"/> Last three (3) years attendance/membership/enrollment figures   |  |
| <input type="checkbox"/> Background/Resume on Pastor/Rabbi and Senior Management team  |  |
| <input type="checkbox"/> Copy of any Organizational Literature (ie. bulletin, newsletter, brochure or other collateral material) |  |

### **Construction Loans may require the following:**

- |  |   |
|--|---|
| <input type="checkbox"/> Information on Capital Campaign             | <input type="checkbox"/> Architect's name and contract, if executed     |
| <input type="checkbox"/> Contractor's Name and Contract, if executed | <input type="checkbox"/> Construction Budget/Cost Breakdown             |
| <input type="checkbox"/> Sources and Uses Breakdown                  | <input type="checkbox"/> Plans and Specifications                       |
| <input type="checkbox"/> Timeline                                    | <input type="checkbox"/> List of all pre-paid items (costs, fees, etc.) |
| <input type="checkbox"/> List of Construction Committee Members      |   |

Additional information and documentation may be necessary to process your Loan Application.

## **APPLICATION INSTRUCTIONS**

Please submit all documents via of email to: [allianceloans@msn.com](mailto:allianceloans@msn.com) this is our preferred method of receiving documents.

## **ALTERNATIVE DELIVERY OPTIONS**

Fax: 866.598.6027

U.S. Mail: Alliance Business Capital PO Box 7013 Fort Myers Beach, FL 33932

## **FOR ASSISTANCE**

Email: [allianceloans@msn.com](mailto:allianceloans@msn.com)

Phone: 866.712.4175 Ext. 101

Thank you for the opportunity to assist you with your Religious Organization Financing Request. Your Business is very important to us.