

BORROWER NAME: _____

TYPE OF LOAN

DOCUMENT 002A
APPLICATION FOR
CREDIT

BUSINESS

PERSONAL

AMOUNT REQUESTED _____

PURPOSE OF LOAN

L&C
503.212.3200
www.LewisandClarkBank.com



APPLICANT IS APPLYING FOR THIS LOAN:

WITHOUT A CO-SIGNER OR GUARANTY OF A RELATIVE OR OTHER PERSON(S)
OR ENTITY.

WITH THE CO-SIGNATURE OR GUARANTY OF ONE OR MORE PERSONS OR ENTITIES (INCLUDING ANY EXISTING
GUARANTORS).

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BORROWER NAME: _____

DOCUMENT 002A
APPLICATION FOR
CREDIT

IF BUSINESS, TYPE OF ORG.

- CORPORATION
- S. CORPORATION
- LLC
- PARTNERSHIP
- INDIV./SOLE PROPRIETORSHIP

ADDRESS: _____

CITY / STATE / ZIP: _____

BUSINESS PHONE: _____

HOME PHONE: _____

CELL PHONE: _____

TAX ID / SS#: _____

DATE OF BIRTH: _____

DRIVER LICENSE #: _____ ISSUED: _____ EXP: _____

2ND PIECE OF ID: _____ LAST 4 #: _____ EXP: _____

CO-BORROWER/GUARANTOR

IF BUSINESS, TYPE OF ORG.

- CORPORATION
- S. CORPORATION
- LLC
- PARTNERSHIP
- INDIV./SOLE PROPRIETORSHIP

ADDRESS: _____

CITY / STATE / ZIP: _____

BUSINESS PHONE: _____

HOME PHONE: _____

CELL PHONE: _____

TAX ID / SS#: _____

DATE OF BIRTH: _____

DRIVER LICENSE #: _____ ISSUED: _____ EXP: _____

2ND PIECE OF ID: _____ LAST 4 #: _____ EXP: _____



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The statements made herein are true, and represent a total disclosure of all the information requested. Lewis and Clark Bank (Lender) is authorized to make all inquiries deemed necessary to determine the creditworthiness of the Indicated Borrower(s) and/or Guarantors or Co-Borrowers whose signature(s) appears below. Lender is authorized to make any investigation of said Borrower(s) credit or employment status either directly or through any agency employed by Lender for that purpose. Borrower(s) further authorizes Lender to provide information concerning applicant's credit relationship to credit reporting agencies or other creditors. It is understood that a portion of this loan may be sold to another institution and Lender is hereby authorized to share any and all information regarding the Borrower(s) with the purchasing institution(s).

BORROWER TITLE DATE

CO-BORROWER / GUARANTOR TITLE DATE

BORROWER NAME: _____

<p>CO-BORROWER/GUARANTOR</p> <hr/> <p>IF BUSINESS, TYPE OF ORG.</p> <p><input type="checkbox"/> CORPORATION</p> <p><input type="checkbox"/> S. CORPORATION</p> <p><input type="checkbox"/> LLC</p> <p><input type="checkbox"/> PARTNERSHIP</p> <p><input type="checkbox"/> INDIV./SOLE PROPRIETORSHIP</p>	<p>ADDRESS: _____</p> <hr/> <p>CITY / STATE / ZIP: _____</p> <p>BUSINESS PHONE: _____</p> <p>HOME PHONE: _____</p> <p>CELL PHONE: _____</p> <p>TAX ID / SS#: _____</p> <p>DATE OF BIRTH: _____</p> <p>DRIVER LICENSE #: _____ ISSUED: _____ EXP: _____</p> <p>2ND PIECE OF ID: _____ LAST 4 #: _____ EXP: _____</p>
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DOCUMENT 002B
ADDENDUM TO
APPLICATION FOR
CREDIT

<p>CO-BORROWER/GUARANTOR</p> <hr/> <p>IF BUSINESS, TYPE OF ORG.</p> <p><input type="checkbox"/> CORPORATION</p> <p><input type="checkbox"/> S. CORPORATION</p> <p><input type="checkbox"/> LLC</p> <p><input type="checkbox"/> PARTNERSHIP</p> <p><input type="checkbox"/> INDIV./SOLE PROPRIETORSHIP</p>	<p>ADDRESS: _____</p> <hr/> <p>CITY / STATE / ZIP: _____</p> <p>BUSINESS PHONE: _____</p> <p>HOME PHONE: _____</p> <p>CELL PHONE: _____</p> <p>TAX ID / SS#: _____</p> <p>DATE OF BIRTH: _____</p> <p>DRIVER LICENSE #: _____ ISSUED: _____ EXP: _____</p> <p>2ND PIECE OF ID: _____ LAST 4 #: _____ EXP: _____</p>
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CO-BORROWER / GUARANTOR	TITLE	DATE
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CO-BORROWER / GUARANTOR	TITLE	DATE
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CORPORATIONS/LLC/PARTNERSHIPS

DOCUMENT 002C
CHECKLIST

- Full copies of federal and state tax returns, including all schedules and attached statements for the past **three years**, signed and dated.
- YTD profit and loss, signed and dated.
- Current balance sheet, signed and dated.
- Complete Business Debt Schedule (enclosed on page 12)
- Copies of recent bank statements for all "liquid assets" (checking, savings, money market, stocks, bond, and mutual funds accounts).
- Copy of executed Bylaws/Operating Agreement/Partnership Agreement.
- Copy of filed Articles of Incorporation/Articles of Organization/Assumed Business Name Registration/Certificate of Limited Partnership.

PERSONAL FINANCIAL INFORMATION

- Personal financial statement, signed and dated. (*A form is enclosed for your use.)
- Schedule of Real Estate owned, signed and dated. (*A form is enclosed for your use.)
- Full copies of your personal federal and state tax returns for the past **three years**, signed and dated.
- Full copies of tax returns, including all Schedules, K-1's and attached Statements, from each Partnership and S Corporation listed on Schedule E of your personal tax returns for the years indicated above, signed and dated.
- Copies of recent bank statements for all "liquid assets" (checking, savings, money market, stock, bond, and mutual funds accounts). Please include copies of statements for retirement accounts.
- To help us comply with the Patriot Act, please provide a photocopy of your driver's license, front and back.
- Résumé

*If the Bank forms provided are not used, please include the information requested on them. Please let us know if you would like us to e-mail the Excel version of our form to you.



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SCHEDULE C **LIFE INSURANCE**

Insured	Primary Beneficiary	Face Amount	Actual Cash Value	Loans on Policy	Name of Company	Location of Office
TOTAL						

SCHEDULE D **ACCOUNTS AND NOTES RECEIVABLE**

Owner(s)	Due From	Address	Collateral	Maturity Date	How Payable	Balance Due
TOTAL						



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DOCUMENT 002D
PERSONAL FINANCIAL
STATEMENT. 4 OF 6.

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SCHEDULE G REAL ESTATE INFO

Parcel No.	Description	Address/Location	Owners	Date Acquired	Cost	Mortgage or Lien Holder	Annual Taxes \$	Mo. Income \$	Mo. Payments \$	Present Value \$	Balance Due \$
1											
2											
3											
4											
5											
6											
7											
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DOCUMENT 002D
PERSONAL FINANCIAL
STATEMENT. 6 OF 6.

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SCHEDULE I **OTHER LIABILITIES**

Payable To	Person Liable	Collateral	How Payable		Balance Due
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
			Per	month	
				TOTAL	



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2006

LEWIS & CLARK
BANK

DOCUMENT 002E
PERSONAL FINANCIAL
STATEMENT SUMMARY.
1 OF 3.

TO: LEWIS & CLARK BANK

NAME: _____ DATE OF BIRTH: _____

NAME: _____ DATE OF BIRTH: _____

ADDRESS: _____ ZIP CODE: _____

CHECK IF APPLICABLE

- Individually, without a co-signer or guaranty of a relative or other person(s) or entity.
- Jointly, with the co-signature or guaranty of one or more persons or entities (including any existing guarantors).

NAMES OF OTHER PERSON(S) AND ENTITY(IES):

PLEASE INDICATE OR PROVIDE EXPLANATION RELATING TO ANY ASSETS OWNED JOINTLY OR BY A TRUST OR LIABILITIES OWED WITH OTHERS. (ATTACH SCHEDULES AND EXPLANATORY NOTES IF NECESSARY.)

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DOCUMENT 002E
PERSONAL FINANCIAL
STATEMENT SUMMARY.
2 OF 3.

LEWIS & CLARK
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Assets		Amount	Liabilities		Amount
Cash	SCHEDULE A In This Institution Other Banks or Savings & Loans		Notes & Loans Payable (Other than Real Estate)	SCHEDULE G Notes Payable to Banks Notes & Loans Payable	
Stocks & Bonds	SCHEDULE B Marketable Securities Others		Insurance Loans	SCHEDULE C	
Tax	Tax Refund Due		Taxes Owed		
Insurance	SCHEDULE C Cash Value		Accounts & Bills Payable	SCHEDULE H Bankcharge Cards Open & Revolving Accounts Other	
Accounts & Notes Receivable	SCHEDULE D				
Real Estate	SCHEDULE E Residence(s) Unimproved Land Income Properties Other		Real Estate Notes & Contracts Payable	SCHEDULE E Residence(s) Unimproved Land Income Property(ies) Other	
Other Assets	SCHEDULE F Other Assets & Personal Property		Other Liabilities	SCHEDULE I Other Liabilities	
TOTAL ASSETS			TOTAL LIABILITIES		
			NET WORTH (Difference between total assets and total liabilities)		



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DOCUMENT 002E
PERSONAL FINANCIAL
STATEMENT SUMMARY.
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LEWIS & CLARK
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Annual Income for Year 2010		Annual Expenses for Year 2010		Contingent Liabilities	
Salary or Wages		Property Tax & Assessments		As Endorser on Notes/ Contracts	
Dividends or Interest		Fed. & State Income Tax		As Guarantor on Notes/ Contracts	
Rentals (Net Income)		Real Estate Loan Payments		For Taxes	
Business (New Income)		Payments on Contracts/ Notes		Other (Describe)	
Other Income (Describe)* Capital Gains		Estimated Living Expenses			
Private Notes		Other			
TOTAL INCOME		TOTAL EXPENSES		TOTAL	

*Alimony, child support or separate maintenance payment income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.



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DOCUMENT 002F
REAL ESTATE
SCHEDULE

LEWIS & CLARK
BANK

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REAL ESTATE SCHEDULE - INCOME PRODUCING PROPERTIES

THIS SCHEDULE OF REAL ESTATE OWNED IS TO BE ATTACHED AND MADE A PART OF MY LOAN APPLICATION AND FINANCIAL STATEMENT DATED _____ FOR PROPERTY AT _____								APPLICANT:						
Property Address & Type of Property	Entity Name in which Title Held	Percent of Ownership	Number of Units or SF	Date Acquired	Purchase Price	Market Value	Name & Address of Lender	Loan Number	Current Balance	Mortgage Payment	Gross Rents	Taxes & Insurance	Maintenance & Vacancy Reserves	Net Rental Income / Loss
							1st							
							2nd							
							1st							
							2nd							
							1st							
							2nd							
							1st							
							2nd							
							1st							
							2nd							
							1st							
							2nd							
TOTALS														



