

# **ADDENDUM TO LOAN APPLICATION PRINCIPALS, OWNERS, OR GUARANTORS**

Complete this form as to the Borrower for all applicable individuals or entities: (1) each proprietor (individuals); or (2) each limited partner who owns 20% or more interest and each general partner; or (3) each stockholder owning 20% or more of voting stock; or (4) each managing member, if applicable, and any member who owns 20% or more interest; and (6) any person or entity providing a guaranty of the loan.

The undersigned's relationship to the Borrower is as follows  
(pick all applicable answers):

☐ Individual Proprietor; ☐ Partnership General Partner; ☐ Partnership Limited Partner;  
☐ Shareholder of Corporation; ☐ LLC managing member; ☐ Owner of 20% or more of the LLC;  
☐ Guarantor.

The undersigned is executing this form in the capacity set forth above.

Signature

## **PERSONAL INFORMATION**

Name	Business Phone:
Residence Address [street, city, state, ZIP]	Residence Phone:
	Cell Phone:
Business Name of Applicant/Borrower	

Assets		Liabilities	
Cash on hand in Banks	\$	Accounts Payable	\$
Savings Accounts	\$	Notes Payable to Banks and Others (Section 2)	\$
IRA or Other Retirement Account	\$	Installment Acct. (Auto) Balance \$_____ Monthly-	\$
Accounts & Notes Receivable	\$	Installment Acct. (Rev) Balance \$_____ Monthly-	\$
Life Insurance-Cash Surrender Value Only (Section 8)	\$	Loan on Life Insurance	\$
Stocks and Bonds (Section 3)	\$	Mortgages on Real Estate (Section 4)	\$
Real Estate (Section 4)	\$	Unpaid Taxes (Section 6)	\$
Automobile-Present Value	\$	Other Liabilities (Section 7)	\$
Other Personal Property (Section 5)	\$	Total Liabilities	\$
Other Assets (Section 5)	\$		
Total	\$	Net Worth	Total \$

## **Section 1**

Source of Income		Contingent Liabilities	
Salary	\$	As Endorser or Co-Maker	\$
Net Investment Income	\$	Legal Claims & Judgments	\$
Real Estate Income	\$	Provision for Federal Income Tax	\$
Other Income (Describe Below*)	\$	Other Special Debt	\$

Description of Other Income in Section 1

\* Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

## **Section 2: Notes Payable to Banks and Others**

(Use attachments if necessary. Each attachment must be identified as part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (Monthly, Etc.)	How Secured or Endorsed Type of Collateral

**Section 3: Stocks and Bonds**

(Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

**Section 4: Real Estate Owned**

(List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder / Servicer: (or attach a copy of the mortgage statement)			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

**Section 5 : Other Personal Property and Other Assets**

(Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and if delinquent, describe delinquency.)

**Section 6: Unpaid Taxes**

(Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

**Section 7: Other Liabilities**

(Describe in detail)

**Section 8 : Life Insurance Held**

(Give face amount and cash surrender value of policies – name of insurance company and beneficiaries)

I authorize Broker and/or Lender(s) to make inquiries as necessary to verify the accuracy of the statements made above and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in civil actions for fraud and damages and possible prosecution any law enforcement agency having jurisdiction to do so.

Signature:	Date:	Social Security / TAX ID Number:
Signature:	Date:	Social Security / TAX ID Number: