

333 South Seventh Street • Suite 2100 • Minneapolis, MN 55402
(612) 36-3730 (612) 313-7518 fax

Primary Applicant's Name: _____ Social Security Number: _____

Email Address: _____ Cell Phone: _____ Home Phone: _____

Home Address (Street, City, State, Zip): _____

Joint Applicant's Name: _____ Social Security Number: _____

Email Address: _____ Business or Occupation: _____

Cell Phone: _____ Home Phone: _____

Same as Primary Applicant

Home Address (Street, City, State, Zip): _____

Business Entity Name (if serving as loan party): _____

Business Type (S Corp, C Corp, Sole Prop, LLC, LLP, etc.): _____ Tax Identification Number: _____

Business Address (Street, City, State, Zip): _____

Business Phone: _____

Loan Request Information

How did you hear about Advisor Financing LLC? _____

Check Desired Loan Acquisition Loan Refinance Describe: _____

Requested Loan Amount \$ _____ Requested Length of Repayment: _____

Do you plan to form, or have you formed a business entity? _____

Please list the name and positions of all officers and shareholders Name/Position _____ % _____
including the agent of record and their percentage of ownership Name/Position _____ % _____
(shareholders must also complete an application): Name/Position _____ % _____

Personal Financial Statement

Assets	Liabilities
Cash Checking \$ _____	Primary Mortgage Balance <input type="checkbox"/> Fixed Rate <input type="checkbox"/> Floating Rate \$ _____
Cash Savings/CDs \$ _____	Home Equity Loan <input type="checkbox"/> Fixed Rate <input type="checkbox"/> Floating Rate \$ _____
Stocks and Bonds/Brokerage Accounts \$ _____	Rental/Vacation <input type="checkbox"/> Fixed Rate <input type="checkbox"/> Floating Rate \$ _____
_____ \$ _____	Rental/Vacation <input type="checkbox"/> Fixed Rate <input type="checkbox"/> Floating Rate \$ _____
Retirement Accounts (401K, IRA, Pension) \$ _____	Vehicle Loan Balance \$ _____
_____ \$ _____	Student Loan Balance \$ _____
Vehicles \$ _____	Credit Card Balance \$ _____
Real Estate (personal residence, rental property & buildings - Itemize) \$ _____	Taxes Payable (including payment plans) \$ _____
_____ \$ _____	Other Liabilities (please list) \$ _____
_____ \$ _____	_____ \$ _____
_____ \$ _____	_____ \$ _____
Market Value of Business Assets (Itemize) \$ _____	_____ \$ _____
_____ \$ _____	_____ \$ _____
Personal Property/Other Assets (please list) \$ _____	_____ \$ _____
_____ \$ _____	_____ \$ _____
_____ \$ _____	TOTAL LIABILITIES \$ _____
TOTAL ASSETS \$ _____	NET WORTH \$ _____

Real Estate					
DESCRIPTION AND LOCATION	PRESENT VALUE	MONTHLY INCOME	TITLE IN NAME OF	RELATED INDEBTEDNESS	
				LIEN HOLDER	AMOUNT
TOTALS					

Schedule of Debt (excluding Real Estate)					
LENDER	ORIGINAL AMOUNT/AVAILABLE CREDIT	PRESENT BALANCE	MATURITY AND/OR PAYMENT SCHEDULE	INTEREST RATE	COLLATERAL
TOTALS					

Personal Budget

	Current Year Estimate		Current Monthly Expenses	Payment Includes Principal, Interest, Taxes & Insurance
SOURCES OF CASH		USES OF CASH		
W-2/1099 Income	\$ _____	Home Mortgage and/or Rent Payment	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dividend/Interest Income	_____	Rental/Vacation Mortgage	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
Rental Income	_____	Home Equity Loan	_____	
Sale of Assets	_____	Vehicle Loan Payment	_____	
Business Income	_____	Student Loan Payment	_____	
Income Tax Refund	_____	Credit Card Payment	_____	
Distributions from Estate/Trust	_____	Child Support/Alimony	_____	
_____	_____	Insurance	_____	
Total Cash Received	\$ _____	Personal (Utilities, Household, etc.)	_____	
		Other Debt _____	_____	
		Total Cash Outflow	\$ _____	

<p>Date of Birth _____</p> <p>Joint Applicant Date of Birth _____</p> <p>Are you: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced</p> <p>Are you a partner or officer in any venture? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are you a cosigner on any other obligations whether business related or personal? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Has the applicant or any proposed guarantor ever obtained credit under another name? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you have any tax liens or contested taxes? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does applicant have any unpaid tax obligations including payroll, sales taxes, and income taxes? (e.g. IRS payment plans) <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever filed for or taken bankruptcy, composition, settlement or assignment for benefit of creditors? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Authorized Signature _____</p> <p>Authorized Signature _____</p>	<p>Are you now, or have you ever been under investigation, charged with a violation, and/or fined for misconduct by FINRA, SEC or any other licensing board/entity? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are you or have you ever been a defendant in any suits or legal actions? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever been convicted of a felony? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever been charged with, arrested, convicted, placed on pretrial diversion, or placed on any form of probation, including adjudication withheld pending probation for any criminal offense other than a minor vehicle violation? Include DUI and DWI offenses and those which have been dismissed, discharged, or not prosecuted (all arrests and charges must be disclosed and explained on an attached sheet). <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Title _____</p> <p>Title _____</p> <p>Date _____</p> <p>Date _____</p>
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