

## Addendum A: Affiliate Schedule

Applicant Business Name: \_\_\_\_\_

Question #3 from SBA Form 2483: Is the Applicant or any owner of the Applicant an owner of any other business, or have common management with, any other business? If yes, list all such businesses and describe the relationship on a separate sheet identified as addendum A.

Owner name: \_\_\_\_\_

Affiliate Business Name: \_\_\_\_\_ (this is the other business that you own or partially own)

Percent Owned by you: \_\_\_\_\_

### Ownership

The below questions should be answered inclusive of the effect that stock options, convertible securities and agreements to merge would have in present effect on the power to control a concern.

1. Do you own more than 50% of this entity? \_\_\_\_\_
2. If you do not own more than 50%, does any other **one** individual or entity own more than 50% of this entity? \_\_\_\_\_
  - a. If no individual or entity owns more than 50% of this entity, are you:
    - 1) President, or
    - 2) Chief Executive Officer, or
    - 3) Other officer, or
    - 4) Managing member, or
    - 5) Partners, or
    - 6) Control the management of the entity, or
    - 7) Have the power under the charter, bylaws or shareholder's agreement to prevent a quorum or otherwise block action by the board of directors or shareholders? \_\_\_\_\_

*If "yes" to question #1, this entity is deemed an Affiliate*

*If "yes" to question #2, this entity is not deemed an Affiliate*

*If "yes" to question #2a, this entity is deemed an Affiliate*

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### Management

Affiliation arises where the CEO or President of the applicant concern (or other officers, managing members, or partners who control the management of the concern) also controls the management of one or more other concerns.

Does this exist for this entity? \_\_\_\_\_

Affiliation also arises where a single individual, concern, or entity that controls the Board of Directors or management of one concern also controls the Board of Directors or management of one of more other concerns.

Does this exist for this entity? \_\_\_\_\_

Affiliation also arises where a single individual, concern or entity controls the management of the applicant concern through a management agreement.

Does this exist for this entity? \_\_\_\_\_

*If "yes" to any "Management" questions above, this entity is deemed an Affiliate*

### Identity of Interest

Affiliation arises when there is an identity of interest between close relatives, as defined in 13 CFR 120.10, with identical or substantially, identical business or economic interests (such as where the close relatives operate concerns in the same or similar industry in the same geographic area).

Does this exist for this entity? \_\_\_\_\_

Where SBA determines that interests should be aggregated, an individual or firm may rebut that determination with evidence showing that the interests deemed to be one are in fact separate.

*If "yes" to above question, this entity is deemed an Affiliate*

Based on your answers above and the instructions provided by SBA,

is this business an Affiliate? \_\_\_\_\_

Number of Employees: \_\_\_\_\_