



# Access Capital Today

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General intake form

Name:

\_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_ Annual Income: \_\_\_\_\_

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

Business Name: \_\_\_\_\_ Ein Number: \_\_\_\_\_

Business Start Date: \_\_\_\_\_ State of Incorporation or LLC: \_\_\_\_\_

Company Email: \_\_\_\_\_ Company Tel: \_\_\_\_\_

Duns Number: \_\_\_\_\_

Company Website: \_\_\_\_\_

Business Gross income for the previous 2 years: 20 \_\_\_\_\_ 20 \_\_\_\_\_ Have you filed taxes? \_\_\_\_\_

How many employees do you have? \_\_\_\_\_ Do you have any corporate equipment? \_\_\_\_\_ Do you have any corporate credit established? \_\_\_\_\_ credit cards \_\_\_\_\_ Vehicles \_\_\_\_\_ Loans \_\_\_\_\_

Does your corporation own any real estate? \_\_\_\_\_ Percentage of ownership \_\_\_\_\_ What bank(s) does your business bank at? \_\_\_\_\_

What are your average business account balances? \_\_\_\_\_ How do you accept payments? \_\_\_\_\_

How many checks do you write per month? \_\_\_\_\_ What is your average service cost? \_\_\_\_\_

Do you accept credit cards? \_\_\_\_\_ Who is your credit card provider? \_\_\_\_\_

How much will your opening deposit \_\_\_\_\_ be? How much is your rent or mortgage payment for your business? \_\_\_\_\_ How much is your rent or mortgage payment at your home? \_\_\_\_\_ Is your rent or mortgage shared? Housing portion of the rent? Business Portion of the rent? \_\_\_\_\_

Where do you bank personally? \_\_\_\_\_ What kind of balances do you carry? \_\_\_\_\_

Do you have a 401k or 403b? \_\_\_\_\_ How much is in the account? \_\_\_\_\_

Do you have annuities, ira accounts, stocks, bonds, mutual funds and how much cash do you have in the bank at all banks personal and business? \_\_\_\_\_

Is your business active and in good standing? \_\_\_\_\_ What do you anticipate your monthly credit spend limit will be? \_\_\_\_\_

Personal Profile:

Name: \_\_\_\_\_

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

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

Driver license number/issue date/exp date \_\_\_\_\_

Employer: \_\_\_\_\_ Years on Job: \_\_\_\_ Annual Income: \_\_\_\_\_

Position on job: \_\_\_\_\_

Where do you bank personally & Balance in accounts? \_\_\_\_\_

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Do you have any partners or friends who will potentially partner with you who have good credit? \_\_\_\_\_

Can you use another person's income who has good credit to qualify for more funding? \_\_\_\_\_

If yes. Please have them to register with [creditkarma.com](http://creditkarma.com) and [identityiq.com](http://identityiq.com) and submit the following just like you.

Username: \_\_\_\_\_ Password: \_\_\_\_\_ last 4 of ssn: \_\_\_\_\_

How much capital are you seeking? \_\_\_\_\_ How soon do you need it? \_\_\_\_\_

Interested in a million-dollar retirement plan with a 100k passive income plan for life? \_\_\_\_\_

Would you like to be business branded and create successful imaging? \_\_\_\_\_