



Capital Palm Partners, Inc.  
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<i>Internal Use Only</i>	
Date Received:	
CPP Account Rep:	
Loan Status: <input type="checkbox"/> Approved <input type="checkbox"/> Declined <input type="checkbox"/> On-hold	
Approval Amount: \$	Sell Rate:

## FAITH QUESTIONNAIRE

ORGANIZATIONAL INFORMATION					
Name of Church:		Denomination:			
Date Founded:		Tax ID Number:			
Current address:					
City:		State:		Zip Code:	
Phone #:		Email:			
Length at Location:		Own / Rent Location:		Mo. Rent:	
Date established at location?		Expiration of Lease:			
Organizational Body (Diocese, Etc.):		Does the central body provide financial support?			
Does the church have programs, such as k-12, daycare?	<input type="checkbox"/> Yes <input type="checkbox"/> No Type:	Does the church offer bible study programs, such as Sunday Bible school?	<input type="checkbox"/> Yes <input type="checkbox"/> No		

CLERGY /STAFF			
Name of Head Clergyman:			
Length of time with organization:		Age:	<input type="checkbox"/> Full time <input type="checkbox"/> Part Time
Other key staff, clergy or leaders:			
(Include Name and Position)			
Who will be the primary contact for this request:			

CONGREGATION INFORMATION			
Size of total congregation:		Average weekly donations:	
No. donors who provide \$500+ in contributions:		No. donors who provide >\$500 in contributions:	
Number of giving units 1 year ago: Number of giving units 2 years ago:			
Average Weekly Worship Attendance:			
What % of congregation commutes more than 3 miles:			
When was the membership database was last purged: Date of last member census:			

Breakdown of members (% of Church Members)							
Non Adults:		30 – 39:		50 – 59:		Over 70:	
18 – 29:		40 – 49:		60 -- 69			



FINANCIAL INFORMATION			
Annual budget:		Annual expenses:	
Are you currently active in fundraising campaigns?	___ Yes ___ No If yes, briefly describe:		
Amount of pledges given:			
Amount of pledges collected:			
Anticipated final collections:			
Below please list the amounts given by the 10 largest givers:	1.	6.	
	2.	7.	
	3.	8.	
	4.	9.	
	5.	10.	
How many campaigns has the organization held in the past:		What has been the historic pledge collection %:	
Name of campaign manager(s):			
Name of current Bank(s):		Average annual depository balance:	
Person in charge of banking decisions and statement reconciliation?		What % of this balance is Unrestricted:	

LOAN REQUEST	
Nature of request (Purchase, Construction, Refinance, etc):	
Amount of loan requested:	
Amount of cash available for down payment:	
Preferred amortization (in years):	
Date funds will be needed:	

BUILDING INFORMATION (IF OWNED)			
Address:			
Year constructed:	Year of last significant renovation:	Square feet:	
Seating capacity:	Proposed Seating Capacity:		
Balance of 1st lien:	Lien Holder:		
Interest Rate:	Monthly Payment:	Maturity Date:	
Balance of 2 <sup>nd</sup> Lien:	Lien holder:		
Interest Rate:	Monthly Payment:	Maturity Date:	
Comments:			

PROPOSED PROJECT (IF APPLICABLE)			
Address:			
Project Budget:	Architect:	Builder:	
Future Value:	Source (Appraisal, Etc):		
\$ spent on project to date :			

Completed by:

Name	Signature	Title	Date



**ALONG WITH THIS QUESTIONNAIRE PLEASE PROVIDE THE FOLLOWING INFORMATION**

1. A minimum of three years of financial statements
2. Year-to-date financial statements
3. If not included in financial statements, please provide a separate report detailing revenue sources (i.e. core contributions,
4. Campaign funds, mission funds, etc.)
5. Provide a breakdown of each staff member's salary and other forms of compensation
6. Provide a detailed list of expenses in the past three years that are deemed discretionary, in a format that can be related to the
7. Financial statements that were provided.
8. Copy of current year's budget
9. Copy of construction budget (If applicable)
10. Updated report of pledges received and collected (If applicable)
11. Copy of articles of incorporation / By-laws
12. Copy of any existing financial commitments (If Applicable)
13. Copy of architect or engineer plans (If Applicable)
14. Copy of a construction budget, along with a list of preliminary project costs that have already been paid