



## CHURCH LOAN QUESTIONNAIRE

Name of Church: \_\_\_\_\_ Pastor: \_\_\_\_\_

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

Year Founded: \_\_\_\_\_ Telephone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_

Please complete the following questions and submit to JTI Funding along with the last 2 years financial statements and current financial statement, plus a detailed letter explaining the purpose of the loan.

1. Our congregation has \_\_\_\_\_ adult members representing approximately \_\_\_\_\_ families.
2. Regular attendance:      A.M. \_\_\_\_\_      P.M. \_\_\_\_\_      Mid-Week \_\_\_\_\_
3. The church's total receipts for last year were \$ \_\_\_\_\_  
This year we expect to receive \$ \_\_\_\_\_      Average weekly contributions \$ \_\_\_\_\_  
We have received \$ \_\_\_\_\_ year to date.
4. Loan Amount: \$ \_\_\_\_\_      Purpose: \_\_\_\_\_
5. If purchasing, purchase price \$ \_\_\_\_\_      Cash available for down payment \$ \_\_\_\_\_  
Sellers Name: \_\_\_\_\_      Telephone: ( ) \_\_\_\_\_
6. If refinancing, current balance \$ \_\_\_\_\_      Current rate \_\_\_\_\_      Fixed:      Yes      No  
Current lender: \_\_\_\_\_      Telephone: ( ) \_\_\_\_\_
7. If building or addition, estimated costs:\$ \_\_\_\_\_      Balance on existing loan \$ \_\_\_\_\_  
Builder: \_\_\_\_\_      Telephone: ( ) \_\_\_\_\_
8. Estimated appraised value of:      Land \$ \_\_\_\_\_      Buildings \$ \_\_\_\_\_
9. Total square footage of buildings: \_\_\_\_\_      Total Acreage: \_\_\_\_\_  
Seating capacity of sanctuary: \_\_\_\_\_      Number of: Classrooms \_\_\_\_\_      Offices: \_\_\_\_\_
10. How did you hear about JTI Funding? \_\_\_\_\_
11. Additional Comments: \_\_\_\_\_  
\_\_\_\_\_

Name of person submitting questionnaire: \_\_\_\_\_

Address: \_\_\_\_\_      Telephone: ( ) \_\_\_\_\_

Cell: ( ) \_\_\_\_\_      Email address: \_\_\_\_\_

**PLEASE PROVIDE THE FINANCIAL INFORMATION REQUESTED UNDER SECTION V.**  
**WE CANNOT PROCESS YOUR APPLICATION WITHOUT THIS INFORMATION**

**I. GENERAL INFORMATION**

1. Church Name: \_\_\_\_\_ Year established: \_\_\_\_\_
2. Street Address: \_\_\_\_\_
3. City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_
4. Senior Pastor's Name: \_\_\_\_\_ Served since: \_\_\_\_\_  
 Age: \_\_\_\_\_ Education *School(s) / Degree(s) / Year(s) degree attained:* \_\_\_\_\_
5. Contact Person: \_\_\_\_\_ position: \_\_\_\_\_
6. Primary Telephone: ( ) \_\_\_\_\_-\_\_\_\_\_ Secondary Telephone ( ) \_\_\_\_\_- \_\_\_\_\_
7. Fax Number: ( ) \_\_\_\_\_- \_\_\_\_\_ email address (if applicable): \_\_\_\_\_
8. Website (if applicable): www. \_\_\_\_\_
9. Denominational Affiliation (*indicate if none*): \_\_\_\_\_
10. Governing Board (circle one): Directors / Trustees / Elders  
 Total # Members on Board: \_\_\_\_\_ # Lay Members on Board \_\_\_\_\_
11. What is the average Sunday worship attendance (**adults only**)?  
 Current: \_\_\_\_\_ 2 years ago: \_\_\_\_\_  
 Last fiscal year: \_\_\_\_\_ 3 years ago: \_\_\_\_\_
12. What is the active membership of the Church (**adults only**)?  
 Current: \_\_\_\_\_ 2 years ago: \_\_\_\_\_  
 Last fiscal year: \_\_\_\_\_ 3 years ago: \_\_\_\_\_

**II. FINANCING NEEDS**

13. Please provide a breakdown of the anticipated sources and uses of funds:

	From Church Cash Reserves	From Requested Loan Proceeds	Total Costs
Construction Costs	\$	\$	\$
Refinancing	\$	\$	\$
Renovation	\$	\$	\$
Purchase	\$	\$	\$
Other	\$	\$	\$
<b>TOTALS</b>	\$	\$	\$

**III. DEVELOPMENT/EXPANSION PLANS**

14. a. Please describe the proposed construction/renovation project, or planned purchase (square footage, seating capacity, description of improvements, planned use of the facility, etc.):

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b. If construction, what is the anticipated ground-breaking date? \_\_\_\_\_

Has a contractor been selected? Yes/No If Yes, who? \_\_\_\_\_

c. If purchase, what is the anticipated closing date? \_\_\_\_\_ How many miles is the new facility from the existing facility? \_\_\_\_\_

**IV. PROPERTY INFORMATION**

15. Please describe the Church's existing property(s) to be used as collateral (acreage, square footage, seating capacity, fellowship hall, kitchen, multi-use facility, etc.):

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16. Please list any existing mortgages on the property(s) listed above:

<u>Property Address</u>	<u>Lender</u>	<u>Loan Balance</u>	<u>Monthly Payment</u>	<u>Balloon Payment</u> (amt./when due?)
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- a.
- b.
- c.

17. Enter appraised values, if available:                      Date of Appraisal: \_\_\_\_\_

a. Land	\$ _____
b. Existing Improvements	_____
c. Anticipated Construction Costs	_____
d. Other	_____
e. <b>TOTAL</b>	\$ _____

**V. FINANCIAL INFORMATION (REQUIRED INFORMATION)**

Please attach or fax to us the following:

- a. Balance Sheets for the last 3 full fiscal years and year-to-date
- b. Income and Expense Statements for the last 3 full fiscal years and year-to-date

**Worksheet completed by:** \_\_\_\_\_ **phone:** \_\_\_\_\_