

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

Date: \_\_\_\_\_

## Self-Employed Questionnaire

*Business information required to properly analyze loan/income/bank statements*

1. Business Type: \_\_\_\_\_

If *Other*, please describe here: \_\_\_\_\_

Provide details of how income is generated:

\_\_\_\_\_  
\_\_\_\_\_

2. Where do you conduct business: Office, Plant, Residence? \_\_\_\_\_

More than one physical site? **(Check One)**    **YES**    **NO**

If Yes, how many? \_\_\_\_\_

Current rent for business space(s)? \_\_\_\_\_

Address(es)? \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

3. How many people do you have employed?

Full Time: \_\_\_\_\_ Part Time: \_\_\_\_\_ Contractors: \_\_\_\_\_

Full Time Payroll: \_\_\_\_\_ Part Time Payroll: \_\_\_\_\_ Contractor Payroll: \_\_\_\_\_

Total Monthly Payroll Expense: \_\_\_\_\_

4. Do you manufacture a product, such that you have a cost of goods sold for the product you ultimately sell?

**(Check One)**    **YES**    **NO**    If **YES**, describe in detail:

\_\_\_\_\_  
\_\_\_\_\_

Estimate for monthly Cost of goods sold: \_\_\_\_\_

5. Do you buy and then resell a product? **(Check One)**    **YES**    **NO**    If **YES**, describe in detail:

\_\_\_\_\_  
\_\_\_\_\_

6. What percentage of your business do you own? \_\_\_\_\_%

If less than 100%, who owns the remaining portion and what percentage?

\_\_\_\_\_  
\_\_\_\_\_

7. Please provide any additional business expenses not listed above: *(Excluding Rent / Payroll / COG Sold)*

\_\_\_\_\_  
\_\_\_\_\_

8. How has Covid-19 affected your business?

\_\_\_\_\_  
\_\_\_\_\_

9. Is there anything else you can tell us about your business that is important for us to know as we review your bank statements, including sources of deposits and withdrawals?

\_\_\_\_\_  
\_\_\_\_\_

Borrower 1 Name/Signature: \_\_\_\_\_ Borrower 2 Name/Signature \_\_\_\_\_

Employee Reviewer Signature: \_\_\_\_\_

Date of Review: \_\_\_\_\_