

Important Notice

Individual applicants, including sole proprietorships and personal trusts using an individual's social security number when filing federal tax returns, may elect to only complete a Personal Financial Statement (PFS) when applying for financing from Community Bank of the Bay (CBB). All other businesses and non-profit organizations applying for financing must complete a Business Loan Application (BLA) that accurately reflects the applicant or guarantor's current financial condition. An application will be considered incomplete until all requested items, including the PFS and/or BLA, have been received by CBB.

Application Information

Legal name of Business and/or Individual Applying for Financing ("Applicant")

Purpose of Loan Funds

Requested Loan Amount (aggregate total)

Primary Contact's Name

Primary Contact's Phone

Primary Contact's Email Address

Business Information

Legal Name of Business

DBA (if applicable)

Business Address

Mailing Address (if different from above)

Business Phone

Business Fax

Website Address

Tax ID

Entity Structure

Sole Proprietorship

Corporation

Partnership

Trust

Limited Liability Company

Limited Liability Partnership

501(c) (Non-Profit)

Other

of Employees

Number of jobs created and/or retained because of the requested financing: _____

Date Established

Does the Business serve and/or employ low to moderate income individuals? Yes No

Ownership Information

Name

Title

% Owned

Name

Title

% Owned

Name

Title

% Owned

Name

Title

% Owned

General Questionnaire

Are any assets held in a trust?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Is the Applicant party to any pending claims, lawsuits, or regulatory proceedings?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Has the Applicant ever had a bankruptcy, lien, or judgment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Does the Applicant have any credit or pending loan applications at other financial institution?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the Applicant leasing real estate from another party?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Does the Applicant guarantee or co-sign any other debt?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does the Applicant anticipate an adverse change to finances that would impact its ability to repay?	<input type="checkbox"/> Yes	<input type="checkbox"/> No			

If "yes", please explain in detail. (Attach additional sheet if needed)

Applicant's Authorization Statement

The information contained in this application is provided to Community Bank of the Bay (CBB) to extend or continue the extension of credit to the applicant. The undersigned (I/we) are authorized to sign on behalf of the applicant and understand CBB is relying on the information provided herein to determine whether it will grant or continue credit to the applicant. I/We understand the applicant is required to notify CBB of any material and/or adverse changes in the information contained in this application. If the applicant fails to notify CBB, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, CBB may declare the indebtedness of the applicant or the indebtedness guaranteed by the applicant, immediately due and payable.

I/We understand CBB is authorized to make all appropriate (legal, regulatory, etc.) inquiries it deems necessary to verify the accuracy of the information contained herein and determine my/our credit worthiness. I/We authorize any person or consumer reporting agency to give CBB any information it may have about the applicant. I/We authorize CBB to answer questions about its credit experience with the applicant. As long as the applicant has any obligation or guarantee outstanding to CBB, the applicant shall supply annually updated financial statements.

I/We acknowledge, on behalf of the applicant, that knowingly making a false statement or overvaluing an asset to obtain a loan from CBB can result either in a fine or imprisonment under either 18 USC 1001 or 18 USC 1014

I/We acknowledge that I/we have read, understand, and agree to the above authorization statement and all terms and conditions contained therein.

Applicant's Authorized Signature		Applicant's Authorized Signature	
Authorized Signer's Name		Authorized Signer's Name	
Title	Date	Title	Date

For Bank Use Only

Officer/Originator Name	Officer/Originator Signature
Officer/Originator NMLS #	Date Application Received