

## **Business Note Worksheet**

This worksheet involves a private business note collateralized by a (select all that pertain)

- |  |  |                                       |
|--|--|---------------------------------------|
| <input type="checkbox"/> commercial real estate      | <input type="checkbox"/> plant and equipment | <input type="checkbox"/> inventory    |
| <input type="checkbox"/> accounts receivable         | <input type="checkbox"/> general intangibles | <input type="checkbox"/> other assets |
| <input type="checkbox"/> personal guarantee of buyer | <input type="checkbox"/> franchise           |                                       |

Description of property and / or business \_\_\_\_\_

Address of Business \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Is the business location leased?  Yes  No If yes, describe lease. \_\_\_\_\_

### ***Historical Information***

Date of Sale \_\_\_\_\_ Sales Price \$ \_\_\_\_\_ Down Payment \$ \_\_\_\_\_

This note is secured by a real estate  1st Mortgage  2nd Mortgage  No real estate

Date of Note (inception) \_\_\_\_\_ Face Amount \$ \_\_\_\_\_ Term (in months) \_\_\_\_\_

Monthly Payment \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_  Fixed  Adjustable

Balloon information, amount & date (if applicable) \_\_\_\_\_

Date of 1st Payment \_\_\_\_\_ Number of Payments Made \_\_\_\_\_ Number of Payments Left \_\_\_\_\_

Due Date of Next Payment \_\_\_\_\_ Balance Due On Note \$ \_\_\_\_\_ Maturity Date \_\_\_\_\_

### ***Payor's Information***

Name of Payor \_\_\_\_\_

Name of Seller \_\_\_\_\_ Phone \_\_\_\_\_

Cellular Phone \_\_\_\_\_ Email \_\_\_\_\_

Motivation for Sale \_\_\_\_\_

### ***Requested Quote***

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Buy Complete Note              | <input type="checkbox"/> Buy _____ % of Note                     | <input type="checkbox"/> Buy Balloon Only |
| <input type="checkbox"/> Buy _____ (number) of payments | <input type="checkbox"/> Seller requires \$ _____ lump sum cash. |   |

Complete the form and return via email to our offices. You will receive a call from one of our underwriters within 24 hours of submission.