



Fall River Community Development Agency
Make It Here Loan Program

MAKING JOBS

Make It Here

Referral

BUSINESS INFORMATION

New Business

Existing Business

Business Name: _____

Address: _____

Telephone#: _____ Tax I.D.# _____

Email Address: _____

Nature of Business: _____

Years Established: _____

Number of Employees: _____

Proprietorship Partnership Corporation Subchapter S

Years at Present Location: _____

Real Estate: () Own () Rent - Lease Terms _____

OWNER INFORMATION

Owner Name: _____ Title: _____

% of Ownership: _____

Home Address: _____

Telephone #: _____

Owner Name: _____ Title: _____

% of Ownership: _____

Home Address: _____

Telephone #: _____

BANKING INFORMATION

Banking Institution: _____

Banking Representative: _____

Telephone#: _____

Have you reached out to your existing banking institution: () Y or () N

Banking Institution's Comments: _____

Amount of Loan Assistance Requested: \$ _____

LOAN APPLICATION CHECKLIST

With this application form, include the following additional documents as indicated.

I. Start Ups (No tax returns filed)

- Business Plan with projections
- Your own personal tax return for the past 3 years (any owner 20% or more)
- Current Year Income Statement and Balance Sheet
- Schedule of business debt
- Personal financial statement

II. Businesses that have existed for two years or less:

- Past years financial state/tax returns (Schedule C)
- Your own personal tax return for the past 3 years (any owner 20% or more)
- Schedule of business debt
- Personal financial statement

III. Businesses that have existed for more than two years:

- Past 3 years financial state/tax returns (Schedule C)
- Your own personal tax return for the past 3 years (any owner 20% or more)

- Schedule of business debt
- Personal financial statement

IV. Other information may be required by financial institution

I hereby authorize the City of Fall River to share this referral and the above documentation with the participating financial institutions.

Applicant Signature: _____ Date: _____

Participating Financial Institutions

BankFIVE

BayCoast Bank

Bristol County Savings Bank

Rockland Trust

St. Michael's Federal Credit Union