

**ALBERTA WOMEN'S ECONOMIC RECOVERY –
CAPITAL GROWTH INITIATIVE**

Loan Application

Please complete the entire application in full. If a field does not apply, enter "N/A"

Applicant Information

Applicant(s) Full Names (including middle)

Primary Phone #:

Secondary Phone #:

Email Address:

Home Mailing Address:

Home Physical Address:

How long here? ____years

Date of Birth:

SIN:

Driver's License #:

Marital status:

Married
Single
Separated Divorced
Common-law

Citizenship:

Canadian
Permanent resident
Other

Do you identify as a/an:

(Note: You may choose to not answer this question, it is voluntary. You may also select multiple that apply. This information is collected to help us better understand the needs of our community.)

Entrepreneur with Disabilities
Francophone
Indigenous
LGBTQ2+
Newcomer to Canada
Visible Minority
Youth (29 and under)

Business Information			
Business Name:			
Business Physical Location:			
Business Mailing Address:			
Website:		Business Phone:	
Nature of Business: (e.g. Manufacturing, retail, wholesale, service, food/beverage, transportation, construction etc.)			
List of services or products business is/will be providing:			
What industries or types of clients are you serving?			
Type of Business: (check all that apply)		Sole Proprietorship	Incorporated
		Partnership	Non-Profit
		Home Based	Full-Time
		Part-Time/Seasonal	Start-Up
		Growing/Maintaining an Existing Business	Purchasing an Existing Business
If a limited company it is/will be registered in the Province of Alberta (please attach a copy of the Certificate of Incorporation or trade name if available):			Yes No
List the name(s) and percentage of shares of all principal owners(s) of the business			
First Name	Last Name	% of Ownership	Telephone

Have you made efforts to access funds from other lending sources?		Yes	No
Reason(s) for decline from other lending sources:			
Business Start Date (estimate if just starting up):			
Fiscal Year End Date:		CRA Business #:	
# Full Time Employees:		# Part Time Employees:	
Purpose of Business Loan: (Operating capital, equipment, leasehold improvements, inventory, non-owner salaries, professional fees). Attach a completed Business Plan.			
Loan Request			
Amount of Loan requested: (Alberta Women's Economic Recovery – Capital Growth Initiative loans range from \$10,000-\$75,000)		\$	
Forecasted Monthly Payments:		\$	
Repayable over:		Months/Years	

Breakdown of Expenses Loan will be used for		
Machinery/Equipment/Vehicle		\$
Leasehold Improvements		\$
Furniture/Fixtures		\$
Working Capital		\$
Inventory		\$
Other (specify)		\$
Other (specify)		\$
Other (specify)		\$
TOTAL REQUEST	\$	

Business Financial Statements	
For existing businesses – complete this section or attach most recent financial statements. For new businesses, use estimates or attach your projected cash flow.	
Rent payment (including insurance and property taxes)	\$
Utilities & Phone/Internet (electricity, natural gas, water, sewer)	\$
Inventory	\$
Transportation (gas, insurance, tires, repairs and maintenance)	\$
Insurance (liability, health, other)	\$
Office & Administration	\$
Marketing	\$
Payroll and Human Resources	\$
Debt Payments (bank loans, car loans, personal loans, family loans)	\$
Credit Card/Line of Credit payments	\$
Other (specify)	\$
Other (specify)	\$
(A.) Total Monthly Expenses	\$

Monthly Income	
Sales of product	\$
Sales of services	\$
Other (specify)	\$
Other (specify)	\$
Other (specify)	\$
(B.) Total Monthly Income	\$
Business Net Income: monthly income (B) minus monthly expenses (A)	\$

Personal Financial Statement	
MONTHLY HOUSEHOLD EXPENSES	
Rent or Mortgage payment (including insurance and property taxes)	\$
Utilities (electricity, natural gas, water, sewer, municipality)	\$
Groceries	\$
Transportation (gas, insurance, tires, repairs and maintenance)	\$
Insurance (life, disability, critical illness, health)	\$
Child Care expenses (including daycare, education savings)	\$
Savings	\$
Entertainment/Hobbies/Dining Out	\$
Debt Payments (bank loans, car loans, personal loans, family loans)	\$
Credit Card payments	\$
Personal Line of Credit payments	\$
Other (specify)	\$
Other (specify)	\$
(C.) Total Monthly Expenses	\$
MONTHLY INCOME	
Employment Income	\$
Spouse/Partner Employment income	\$
Rental income	\$
Child Support	\$
Alimony	\$
Other (specify)	\$
Other (specify)	\$
Other (specify)	\$
(D.) Total Monthly Income	\$
Monthly expenses (C) minus monthly income (D)	\$

Personal Assets				
Cash/Savings/Investments	Amount	Bank/Firm	Branch	
Cash	\$			
Cash	\$			
Savings	\$			
RRSP's	\$			
Stocks, Bonds, Investments (cash value)	\$			
Life Insurance (cash value)	\$			
Other (specify):	\$			
Other (specify):	\$			
Real Estate				
Address	Purchase Year	Price Paid	Owners on Title	Present Value
Vehicles/Equipment/Machinery				
Make/Model	Purchase Year	Price Paid	Owners on Title	Present Value
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$
TOTAL ASSETS	\$			

Personal Debts			
LINES of CREDIT/CREDIT CARDS	Monthly Payment	Bank/Card/Store	Balance Outstanding
Overdraft on bank account			\$
Line of Credit			\$
Line of Credit			\$
Credit/Store Card			\$
Credit/Store Card			\$
Credit/Store Card			\$
Other (specify):			\$
Other (specify):			\$
(E.) TOTAL CREDIT CARD DEBT:	\$		
Mortgage and Real Estate Loans			
Address	Bank/Branch	Payment & Frequency	Balance Outstanding
			\$
			\$
			\$
(F.) TOTAL MORTGAGE DEBT:	\$		
Personal Loans/Vehicle Loans/Equipment Loans			
Item Purchased	Bank/Lender	Payment & Frequency	Balance Outstanding
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
(G.) TOTAL PERSONAL LOANS/VEHICLE/EQUIPMENT DEBT:	\$		

PRIVACY AND PROTECTION OF PERSONAL INFORMATION

We are committed to protecting the privacy and confidentiality of the personal information which you provide to us, and to limiting the collection, use and disclosure of your personal information for required business and legal purposes only. We would like to collect, use and disclose personal information from you, for the purposes of establishing and managing our relationship with you; providing you with programs, resources, and services; and complying with applicable law.

INFORMATION COLLECTION NOTICE AND AUTHORIZATION:

When you become a client of Community Futures or when you apply to become a client, we will collect the information and use it to:

- Confirm your identity
- Check your credit history
- Open an account with our office
- Provide ongoing services

We may disclose your personal information:

- To a person who we are satisfied is requesting information on your behalf
- To other business units in Community Futures to help serve you better
- To Government departments for program compliance and reporting requirements
- To our Legal Counsel
- To a credit reporting agency
- When permitted or required by law
- To a public authority if, in our reasonable judgment, there appears to be an imminent danger which could be avoided by disclosing the information.

The gathering and disclosing of all information shall be governed by the provisions of Alberta's Personal Information Protection Act (PIPA).

I, the undersigned, consent to the collection and disclosure of the information provided in this loan application.

I declare that the statements made herein are for the purpose of obtaining business financing and are to the best of my knowledge complete and correct.

Date:	Print Name:	Signature: