



Wind River Development Fund

Loan Application

P.O.BOX 661, FORT WASHAKIE, WY 82514 307-335-7330; FAX 307-335-7332

I. General Information

Name of applicant: _____
Name of business: _____
Mailing Address of business: _____
Physical Address of business: _____
Telephone number: _____ Fax number: _____

II. Ownership & Management

Structure of business (Check One)

Corporation LLC
Sub Chapter S Corporation Partnership Sole Proprietorship

Ownership of applicant company (*List all owners & stockholders*):

III. COMPANY HISTORY/PROFILE

Month/year business was established: _____ Tax ID or EIN #: _____

Line of Business _____

Fulltime Employees _____; # Parttime Employee ____ (include owner, if applicable)

IV. COLLATERAL: Name Description Value

IV. COLLATERAL:	Name	Description	Value

V. Existing Business Loans Payable

Whom Payable/ Account. Number	Original Amount	Original Loan Date month/year	Term	Interest Rate	Outstanding Balance	Collateral Used
1.		/				
2.		/				
3.		/				

VI. DESCRIPTION OF PROPOSED FINANCING

LOAN REQUEST (Please Itemize):

Building Renovations: _____

Owner Contribution _____

Leasehold Improvements: _____

Other Funding Sources: List Separately

Machinery & Equipment/Supplies: _____

Inventory: _____

Working Capital: _____

Other (describe) Vehicle use; Home

Total Loan Request: \$ _____

Total Project Costs: \$ _____

*(Total Loan Request = Total Project
Costs minus Owner Contribution and
Other Funding Sources)*

-
- Are you presently under indictment, on parole or probation or have you ever been charged with or arrested or convicted of any criminal offense other than a vehicle violation? Attach explanation if yes. Yes ___ No ___
 - Have you been involved in bankruptcy proceedings or insolvency proceedings or have pending personal or business judgments, unsettled lawsuits or major disputes? Attach explanation if yes. Yes ___ No ___

Please submit this application with any additional information requested.

I/We authorize the **Wind River Development Fund** to investigate my/our personal and business financial credit history as necessary to process a loan application. The undersigned authorize any person or consumer reporting agency to give you any information it may have on the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned. THE UNDERSIGNED, in applying for financial assistance from **Wind River Development Fund**, recognizes that prior to receiving any financial assistance he or she will agree to comply with all federal, tribal, state and local laws and regulations to the extent that such are applicable.

Name of Business:

Signature/Title:

Date:

Signature/Title:

Wind River Development Fund is an equal opportunity lender. WRDF does not discriminate on the grounds of race, color, religion, gender, marital status, disability, or national origin.

Personal Financial Statement

As of _____, 20__

Complete this form for (1) each proprietor, or (2) each limited partner who has ownership in the business, and each general partner, or (3) each stockholder, or (4) any other person or entity providing a guaranty of the loan.

Name	Business Phone ()
Residence Address	Residence Phone ()
Business Name of Applicant/Borrower	Business Phone ()

ASSETS	Balance (Omit Cents)	LIABILITIES	Balance (Omit Cents)
Cash on hand and in banks	\$ _____	Notes Payable (Section 2)	\$ _____
Savings accounts and CDs	\$ _____	Auto Loans – Monthly Payment \$ _____	\$ _____
Life Insurance – Cash Value only (Section 8)	\$ _____	Credit Cards – Monthly Payment \$ _____	\$ _____
Accounts & Notes Receivable	\$ _____	Other Installment Loans (Section 5)	\$ _____
IRA and other Retirement Accounts	\$ _____	Loan on Life Insurance or Retirement	\$ _____
Stocks & Bonds (Section 3)	\$ _____	Unpaid Taxes (Section 6)	\$ _____
Real Estate (Section 4)	\$ _____	Mortgages on Real Estate (Section 4)	\$ _____
Automobile Yr./Make _____	\$ _____	Other Debt (Section 7)	\$ _____
Automobile Yr./Make _____	\$ _____	Guarantor on Someone Else’s Loan	\$ _____
Other Personal Property (Section 5)	\$ _____	Total Liabilities	\$ _____
Other Assets (Section 5)	\$ _____	Net Worth (Total Assets – Total Liabilities)	\$ _____
Total Assets	\$ _____	Debt/Worth (Total Liabilities/Net Worth)	\$ _____

Section 1. Annual Household Income		Annual Household Expenses	
Base Salary	\$ _____	Mortgage/Rental Payment	\$ _____
Spouses/Other Base Salary	\$ _____	Loan Payments	\$ _____
Bonus/Commissions	\$ _____	Credit Card Payments	\$ _____
Alimony/Child Support*	\$ _____	All Taxes (property, income, etc.)	\$ _____
Real Estate & Investment Income	\$ _____	Living Expenses (include insurance, utilities, food, clothing, etc)	\$ _____
Other Income (Describe below)	\$ _____	Alimony/Child Support	\$ _____
Total Annual Household Income	\$ _____	Total Annual Household Expenses	\$ _____

Description of Other Income in Section 1

*Note: Alimony or child support payments need not be disclosed in Other Income unless it is desired to have such payments counted in total income.

Section 2 -- Notes Payable to Bank and Others (Use attachments as necessary. Each attachment must be identified as a part of the statement, signed and dated.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Payment Frequency	How Secured or Endorsed & Type of Collateral

Section 3 – Stocks & Bonds (Use attachments as necessary. Each attachment must be identified as a part of the statement, signed and dated.)

Number of Shares	Name of Securities	Cost	Market Value Quotation Or Exchange	Date of Quotation Or Exchange	Total Value

Section 4 – Real Estate Owned (List each parcel separately. Each attachment must be identified as a part of the statement, signed and dated.)

Type of Property Address of Property	Date Purchased	Original Cost	Present Market Value	Mortgage Balance	Monthly Payments	Monthly Rental Income	Name & Address of Mortgage Lender

Section 5 – Other Personal Property & Other Assets including business investments not described above (Describe, and if any is pledged as security, provide details of debt in Section 2 above. If assets are pledged for the debt of others, state name and address of lienholder, amount of lien, terms of payment, and if delinquent, describe delinquency.)

Section 6 – Unpaid Taxes (Describe in detail: type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

Section 7 – Other Debt (Describe in detail.)

Section 8 – Life Insurance Held (Give face amount and cash surrender value of policies, name of insurance company and beneficiaries.)

I authorize Wind River Development Fund to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify that the statements contained in the attachments and above are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan, equity capital, a guaranty or some other financial accommodation. I understand FALSE statements may result in forfeiture of benefits and possible prosecution.

Have you ever filed bankruptcy? _____ Yes _____ No Do you have a will? _____ Yes _____ No
 Do you have life insurance? _____ Yes _____ No Do you have disability insurance? _____ Yes _____ No

Signature: _____ Date: _____ Social Security #: _____

Spouse's Signature: _____ Date: _____ Social Security #: _____



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Tel: 307-335-7330 Fax: 307-335-7332
Email: info@wrdf.org Web: www.wrdf.org

BUSINESS LOAN CHECK LIST

Applicant's Name: _____

Date Completed Application Received: _____

- _____ 1. ***Loan Application Form enclosed.***
- _____ 2. ***Business Plan*** Please provide a written business plan for your business. Be sure to include the following: business description, management qualifications, operating plan, marketing plan, and at least two years of projected cash flows.
- _____ 3. ***Personal Financial Statement*** Furnish a signed current statement for each stockholder, partner, officer, and owner. *Form enclosed.*
- _____ 4. ***Personal Tax Returns*** Complete federal tax returns for the last three years for each individual referenced in #3 above (or signed extension).
- _____ 5. ***Business Financial Statements and Tax Returns*** Submit income statements, balance sheets and tax returns for the last three years for business and affiliates.
- _____ 6. ***Interim Business Financial Statements*** Submit statements that are current within ninety (90) days of application filing date.
- _____ 7. ***List of Machinery or Equipment*** If you are buying machinery or equipment with your loan money, please provide a list of equipment and cost as quoted by the seller.
- _____ 8. ***Purchase Agreement*** If you are buying real estate or an on-going business with your loan money, please submit a Purchase Agreement, including the Seller's name and contact information.
- _____ 9. ***Construction Plans & Project Cost*** For construction loans, please submit an estimated cost of the project and statement of source of additional funds. Also, please provide a preliminary construction plans as prepared by a qualified, independent third party such as a contractor or architect.