

## CREDIT APPLICATION

<b>Vendor:</b>		
Name: _____	Contact: _____	Tel: _____
<b>Customer:</b>		
Legal Name: _____	Contact: _____	Tel: _____
Address _____		Fax: _____
		E-mail: _____
Type of Business: _____		Yrs in Bus: _____
C-Corp: ( )    S-Corp: ( )    Sole Prop ( )    LLC ( )    Partnership: ( )    Ltd. Ptnrshp: ( )    Other ( ) : _____		
Fed ID#: _____	Web address : _____	State of Incorp: _____
<b>Personal Information: Owners</b>		
Officer 1: _____	Title: _____	Own %: _____
Home: _____		S.S.#: _____
Officer 2: _____	Title: _____	Own %: _____
Home: _____		S.S.#: _____
Officer 3: _____	Title: _____	Own %: _____
Home: _____		S.S.#: _____
<b>Bank and Lease References</b>		
Bank 1: _____	A/C#: _____	Tel: _____
Contact: _____	Since: _____	Loans?: _____
Bank 2: _____	A/C#: _____	Tel: _____
Contact: _____	Since: _____	Loans?: _____
Lease Co. 1: _____	A/C #: _____	Tel: _____
Lease Co. 2: _____	A/C #: _____	Tel: _____
Insurance Co: _____	Policy #: _____	Tel: _____
Contact: _____	Since: _____	
<b>Trade References (No CODs)</b>		
Trade 1: _____	A/C#: _____	Tel: _____
Trade 2: _____	A/C#: _____	Tel: _____
Trade 3: _____	A/C#: _____	Tel: _____
Landlord: _____	Contact: _____	Tel: _____
Building Lease Expires on: _____	Is Lease Renewable? Yes ( ) No ( )	Current Term: _____
<b>Equipment Details</b>		
Description: _____		
Cost: _____	Condition: New ( ) Used ( )	
Location: _____	% Sales Tax: _____	
Term (mos.): 24 ( ) 36 ( ) 48 ( ) 60 ( ) Other ( ) _____	Purchase Option: \$1 buyout: ( ) 10% final payment ( ) Fair Market Value ( ) Other ( ) _____	
<b>- THIS APPLICATION DOES NOT OBLIGATE CATALYST FINANCIAL GROUP, INC. TO ENTER INTO THE LEASE OR FINANCING -</b>		
The undersigned represents that all information provided with this Application is true and correct, and hereby authorizes Catalyst Financial Group, Inc. to obtain from third parties information it deems necessary to arrive at a decision regarding this Application. By signing below, the undersigned individual(s), as principal of and/or guarantor for the applicant, hereby authorizes Catalyst Financial Group, Inc., its designees, assigns or potential assigns, to review his/her personal credit profile provided by a national credit bureau in considering this Application and for the purpose of update, renewal, or extension of credit to the Applicant or the collection of any resultant accounts. I authorize all deposit, borrowing, financial and trade information to be released to Catalyst Financial Group, Inc. by telephone or fax. A photocopy or fax of this authorization shall be valid as the original. To help fight terrorism and money laundering, Federal Law requires banks to verify the information you provide, which may include driver's license or other documents, to identify you.		
Signed _____	Print Name _____	Date _____
Signed _____	Print Name _____	Date _____

## COMPARABLE BORROWING REFERENCE SHEET

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**Customer Name:** \_\_\_\_\_

Use this sheet for ALL banking and leasing references *other* than your normal business checking account on the Application.

***Include any other borrowing references, current or paid in full, with which you have established credit. Include other equipment leases, working capital loans, equipment loans, lines of credit, etc...***

**Strong Comparable Borrowing significantly increases possibility of quick approval!**

### LEASE/LOAN REFERENCE:

Lender Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Lender Contact: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Account Type: \_\_\_\_\_ Account Number: \_\_\_\_\_ Date Opened: \_\_\_\_\_  
 Opening Bal: \_\_\_\_\_ Balance Remaining: \_\_\_\_\_  
 Secured by: Personal Guarantee: Yes  No  Other Assets: Yes  No  What?: \_\_\_\_\_  
 Comments: \_\_\_\_\_

### LEASE/LOAN REFERENCE:

Lender Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Lender Contact: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Account Type: \_\_\_\_\_ Account Number: \_\_\_\_\_ Date Opened: \_\_\_\_\_  
 Opening Bal: \_\_\_\_\_ Balance Remaining: \_\_\_\_\_  
 Secured by: Personal Guarantee: Yes  No  Other Assets: Yes  No  What?: \_\_\_\_\_  
 Comments: \_\_\_\_\_

### MORTGAGEE INFORMATION:

Lender Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Lender Contact: \_\_\_\_\_ Fax: \_\_\_\_\_  
 Account Number: \_\_\_\_\_ Date Opened: \_\_\_\_\_ Opening Bal: \_\_\_\_\_  
 Interest Only: Yes  No  Fully Amortizing: Yes  No  Balloon: Yes  \$ \_\_\_\_\_ No   
 Comments: \_\_\_\_\_

DO YOU HAVE A SECOND MORTGAGE? Yes  No  \$ \_\_\_\_\_

Lender Name: \_\_\_\_\_ A/C #: \_\_\_\_\_ Phone: \_\_\_\_\_

# AUTHORIZATION TO RELEASE CREDIT INFORMATION

To: \_\_\_\_\_ From: \_\_\_\_\_  
Name of Bank Name of Customer  
\_\_\_\_\_  
Street Address Street Address  
\_\_\_\_\_  
City ST, Zip City ST, Zip

Attention: \_\_\_\_\_ Phone: \_\_\_\_\_  
Bank Phone: \_\_\_\_\_ Checking Acct #: \_\_\_\_\_  
Bank Fax: \_\_\_\_\_ Loan Acct #: \_\_\_\_\_

As a customer of the bank, I request that you release the information requested below to CATALYST FINANCIAL GROUP, Inc., with whom we are proposing to enter into a commercial equipment lease. Thank you in advance for your prompt attention to this request.

By: \_\_\_\_\_  
Signature of Customer  
\_\_\_\_\_  
Title of Person Signing

## **Checking Account**

Account Opened: \_\_\_\_\_ Average Balance: \_\_\_\_\_ Sweep A/C:  Yes  No  
Overdrafts:  Yes  No When: \_\_\_\_\_ How many: \_\_\_\_\_  
Returns:  Yes  No When: \_\_\_\_\_ How many: \_\_\_\_\_  
Type of Account:  Commercial  Personal  
Name on Account (if different from above): \_\_\_\_\_  
Account Handled:  Satisfactory  Unsatisfactory  Do not rate

**Loan Account**  Unsecured  Secured by: \_\_\_\_\_  
Loan No.: \_\_\_\_\_ Type of Loan: \_\_\_\_\_ Date Opened: \_\_\_\_\_  
Highest Loan Amt: \_\_\_\_\_ Present Balance: \_\_\_\_\_ # of Lates: \_\_\_\_\_  
Terms: \_\_\_\_\_ Payment Experience: \_\_\_\_\_  
Comments: \_\_\_\_\_  
Bank Representative: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature  
Print Name and Title: \_\_\_\_\_

**PLEASE PHONE OR FAX THE COMPLETED INFORMATION TO:**



152 Deer Hill Ave, Suite 208  
Danbury, CT 06810  
800-544-0884 or 203-790-4177  
Fax: 203-790-4393



152 Deer Hill Ave., Suite 208  
Danbury, CT 06810  
800-544-0884 203-790-4177  
Fax: 203-790-4393

### FINANCING QUOTE REQUEST FORM

Provided with the following general Project Information, Catalyst will provide a Preliminary Project Financing Proposal:

#### VENDOR (INSTALLER) INFORMATION:

Vendor Name: \_\_\_\_\_  
Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

#### CUSTOMER (HOST) INFORMATION:

Full Legal Name and Address of Prospective Borrower: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Type of Business (describe - Commercial, Industrial, Non-Profit, Municipal, etc....): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Gross Project Cost: \$ \_\_\_\_\_  
Utility Rebate or Grant (if any): \$ \_\_\_\_\_  
Will rebate be applied to Project Cost?: (Y/N): \_\_\_\_\_  
Tax credit (if any): \$ \_\_\_\_\_  
Net Project Cost: \$ \_\_\_\_\_  
Annual Estimated Energy Savings (if any): \$ \_\_\_\_\_  
Equipment to be installed (brief description): \_\_\_\_\_  
\_\_\_\_\_

Type Financing Requested:  \$1.00 PO Lease  10% PO Lease  True Lease (FMV)  
 Equipment Finance Agreement  Tax-Exempt Lease-Purchase

Term of Financing, in months: \_\_\_\_\_  
Note/Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Thank you for this information. Catalyst will prepare a preliminary financing proposal and fax it to you immediately. Please do not hesitate to call us with any questions you may have.