



ALLISON MORTGAGE

Loan Servicing Corporation

105 Cliftwood Drive, Atlanta, GA 30328

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Religious Organization Information Request Form

General Information

(If more room is required, please feel free to attach additional sheets.)

1. Name of organization:

2. Address of organization:

3. Phone number:

4. Main contact:

5. What is the legal structure (i.e. corporation)?

6. What is your Tax ID Number?

7. Inception date of organization:

8. How long have you been at your current location?

9. How many worship service are held?

10. Is there a formal tithing policy?

11. When are offerings collected?

12. What is the seating capacity of your facility?

13. Name of Clergyman:

Pastors or Ministers	Title	Yrs in Office
_____	_____	_____
_____	_____	_____
_____	_____	_____

14. Member of denominational body, affiliated with related congregations or sharing a common name? Yes / No

If yes, which one?

If yes, how is the body structured?

If yes, how much does your organization contribute directly to the affiliate body annually?

15. Committee/person in charge of financial related decisions?

Official	Title	Yrs in Office	Secular Emp.
_____	_____	_____	_____
_____	_____	_____	_____

16. What committee / persons are in charge of other decisions?

Financial Information:

For question 1-6, please list requested information for the last five years:

	<u>2006</u>	<u>2005</u>	<u>2004</u>	<u>2003</u>	<u>2002</u>
1. Budgeted Operating Income:	_____	_____	_____	_____	_____
2. Actual Operating Income:	_____	_____	_____	_____	_____
3. Total Members:	_____	_____	_____	_____	_____
4. Number of Giving Units: (Family or Single Units)	_____	_____	_____	_____	_____
5. Average Worship Attendance	_____	_____	_____	_____	_____
6. Average Sunday School Attendance	_____	_____	_____	_____	_____
7. Breakdown of Current Membership: Under 18:	_____				

18 – 30: _____

31 – 60: _____

Over 60: _____

(Note: If your organization has a breakdown in alternate age groups, please use that grouping.)

8. Average family income of membership?

9. When were your membership rolls last purged?

10. Are you past due or have been past due on any financial obligation during the last 3 years? If yes, give details.

11. Are any members of your church going to receive loan proceeds? If yes, give details.

Property Information:

1. How many acres do you own?

2. What is the square footage of your facilities?

3. How many acres are occupied by your facilities and what was the cost?

4. What date did you acquire your facilities and what was the cost?

5. Please list a description of the year completed, and the construction cost of any improvements:

6. Has the property been appraised? Yes/No

Date:

Value:

Appraiser:

Qualifications:

7. Does the church have Insurance Coverage? Yes/No and at what amount

8. Who holds title?

Project Information:

1. Please provide a description of the current project:

2. Who is the architect?

3. If known, who is the contractor?

4. What is the total cost of the project?

Construction: _____

Soft Costs: _____

Furniture / Fixtures: _____

Contingency: _____

Interest Carry During Construction: _____

Total Estimated Cost: _____

5. What is the anticipated length of construction?

6. How much cash is available for the project today?

Are you / will you be involved in a special fund raising campaign for the project?

What is / was the start date?

What is / was the length of the campaign?

How much is pledged to date?

What is the pledge period?

Any pledges over \$25,000?

Any pledges over \$50,000?

Any pledges over \$100,000?

Did you use a professional fundraiser? Yes/No, If yes which one?

Loan Information:

1. What is the amount of your current loan request?

2. List all current lien holders, lien position, and current balances:

3. Is the Board of Trustees action necessary for this loan? Yes/No (attach resolution)

4. Is the congregation's approval necessary for this loan? Yes/No (attach resolution)

5. Is higher authority necessary for this loan?

Additional Information Requested:

1. Resume' from head clergyman
2. Complete 1003 application on all Board Members
3. Last two years fiscal year-end financial statements (income statements and balance sheets)
4. Most recent interim financial statements (combined operating and restricted, income statements and balance sheets)
5. Last two years bank statements (personal and business)
6. A copy of the latest budget
7. If available, copy of architect's and builder's contract (if applicable)
8. If available, copies of appraisals and/or environmental assessments