

Loan Intake Form

NON-MORTGAGE

Loan Details

General Objective/ Purpose of Loan

Collateral Type (Securities, Plane, etc.)

Estimated Value of Collateral

Desired Loan/ Line Amount

Current Banking/ Lender Relations

Open to new Banking Relationship?

Unique Characteristics of Transaction

Client Details

Income Type

Annual Income
(including recurring bonuses)

2024:

2023:

2022:

Liquid Assets

Unique Client Details
(irregular income, bad credit, assets
held in irrevocable trust, etc.)