



*Removing Barriers to Small Business Lending*

## CLIENT PROFILE

Owner Names (Please include all owners and the percentage of ownership)
Company Name & Address
Primary Phone & Email
Type of Business
Date Business Was Started
Primary Customers
Why are you seeking financing & how much money do you need to borrow?
What financial institution do you use?
Do you have a business relationship officer? If so, please list.
Have you officially requested financing? What was the outcome? If declined, why?