

LAWTON REAL ESTATE

BUSINESS PLAN APPLICATION Simple Form

Date of submission: _____

Business Type: Corporation Start-up New Business
 Partnership Re-location
 Individual or Sole Proprietor Additional Location

Business Name: _____

Business Address _____ City _____ State _____ Zip _____

Email Address _____

Business Phone _____ Fax _____ Cell Phone _____

Type of Business _____ DBA _____

Name of Corporation, If Applicable: _____

Description of Business. Specific "uses" necessary for a lease:

LIST INDIVIDUALS, SPOUSE, ALL PARTNERS OR OFFICERS

1. Name: _____

Address _____ City _____ State _____ Zip _____

Home Phone _____ Business Phone _____ Fax _____

Social Security # _____ Driver's License # _____ Cell Phone _____

Date of Birth _____ Place of Birth _____ Email Address _____

110 W. Fir Street, Brea, CA 92821
Phone: (714) 529-6666 • Fax: (714) 529-6667
www.LawtonRe.com

e-mail: Michael@LawtonRe.com

2. Name: _____

Address City State Zip

Home Phone Business Phone Fax

Social Security # Driver's License # Cell Phone

Date of Birth Place of Birth Email Address

3. Name: _____

Address City State Zip

Home Phone Business Phone Fax

Social Security # Driver's License # Cell Phone

Date of Birth Place of Birth Email Address

4. Name: _____

Address City State Zip

Home Phone Business Phone Fax

Social Security # Driver's License # Cell Phone

Date of Birth Place of Birth Email Address

Applicant represents that all the above statements are true and correct and hereby authorizes verification of the above items including, but not limited to, the obtaining of a credit report and agrees to furnish additional credit references upon request.

Signature of Applicant: _____ Date: _____

Signature of Applicant: _____ Date: _____

PERSONAL & CONFIDENTIAL FINANCIAL STATEMENT

Name: _____

Business Telephone: _____

Residential Address: _____

Home Telephone: _____

Cell Phone: _____

VALUE OF ASSETS		LIABILITIES & NET WORTH	
Cash (on hand & in banks)		Unsecured Notes Payable (Credit Cards, etc.)	
U.S. Government Securities (T-Bills, Bonds)		Secured Notes Payable (Lines of Credit, etc.)	
Marketable Securities (Stocks, Mutual Funds)		School Loan	
Non-Marketable Securities			
Notes Receivable – Itemize			
Real Estate – Personal Residence Fair Market Value		Real Estate Mortgage – Primary Residence Current Balance	
Real Estate – 2 nd or 3 rd Homes Fair Market Value		Real Estate Mortgage – 2 nd or 3 rd Home Current Balance	
Real Estate – Income Property Fair Market Value		Income Property Mortgage Current Balance	
Partial Interests in Real Estate – (%) Your Net Equity Value			
Automobile #1 Year & Type		Automobile #1	
Automobile #2 Year & Type		Automobile #2	
Automobile #3 Year & Type		Automobile #3	
Boats, RV's, etc.		Boats, RV's, etc.	
Furniture, Personal Property & Jewelry		Furniture, Personal Property & Jewelry	
Business Interests – Itemize		Business Interests Loan	
		Other Liabilities – Itemize	
Other Assets – Itemize		Total Liabilities	
		Net Worth (Deduct Liabilities from Assets)	
TOTAL ASSETS		TOTAL LIABILITIES & NET WORTH	

PERSONAL & CONFIDENTIAL FINANCIAL STATEMENT

SOURCES OF ANNUAL INCOME			GENERAL INFORMATION
	Wife	Husband	
Salary			Are you a partner, stockholder, or officer in any other business venture? Wife ___ Husband ___
Commissions & Bonuses			
Dividends			
Real Estate Income			If so, what?
Spousal Support			
Child Support			
Other Income – Itemized			
			Are you, or have you ever been a defendant in any legal actions, suits or bankruptcy? Wife ___ Husband ___
			Explain.
Total Annual Income			
Combined Annual Income			

CONTINGENT LIABILITIES			Comments:
	Wife	Husband	
Endorser, Guarantor or Co-Obligee on Leases, Contracts or Loans			
Legal Claims?			
Income Tax Claims?			
Other – Itemize			

The undersigned represents that this financial statement is true and correct.

Signed _____
Date

Signed _____
Date

Name Printed _____

Name Printed _____