

# BUSINESS RETENTION & ATTRACTION LOAN PROGRAM

## APPLICATION

### GENERAL INFORMATION

Business Name \_\_\_\_\_ DBA (if any) \_\_\_\_\_

Project Site Address \_\_\_\_\_ Mailing Address (if different) \_\_\_\_\_

Senior Officer \_\_\_\_\_ Title \_\_\_\_\_ Phone \_\_\_\_\_

Contact Person for this application \_\_\_\_\_ Title \_\_\_\_\_ Phone \_\_\_\_\_

Principal Product/Service \_\_\_\_\_ Years in Business \_\_\_\_\_ Years in Santa Maria \_\_\_\_\_

Primary Activity:     Manufacturing     Service     Wholesale/Distribution     Retail

Ownership:     Corporation     Partnership     Sole Proprietorship     LLC

Other \_\_\_\_\_

Type of Business:     Corporation     Partnership     Sole Proprietorship     LLC

### ELIGIBILITY QUESTIONS

1. Is any of the applicant business shareholder, partner, director, or officer, associated with the City of Santa Maria, Santa Maria Valley Chamber of Commerce, or Coastal Business Finance?     Yes     No

2. Have any of the applicant business, shareholder, partner, director, or officer had or do have any delinquencies to any government agency including the City of Santa Maria, or State of California or federal agency?     Yes     No

3. Are there any unsatisfied judgments of a court outstanding against any of the applicant business, shareholder, partner, director, or officer of the requested loan?     Yes     No

4. Is the applicant business, shareholder, partner, director, or officer of the requested loan involved in any pending bankruptcy or insolvency proceedings or any pending litigation before a court or administrative agency (other than a plaintiff in routine collection suit)?     Yes     No



Summary of Project: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

|                                                                                                                          |                                                                                                                                                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Project Cost*:</b> List Project Uses<br>_____<br>_____<br>_____<br>_____<br>_____<br><b>Total Project Cost:</b> _____ | <b>Funding:</b> Project Funding Sources<br>Business Contribution: _____<br>Private Lender: _____<br>_____<br><b>Sub-Total of Project Funding:</b> _____<br>Requested RLF Funds: _____<br><b>Total Project Funding:</b> _____ |
|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Describe Need for Non-Private source (RLF) Funding: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**LABOR INFORMATION**

|                                   |           |           |                       |
|-----------------------------------|-----------|-----------|-----------------------|
|                                   | %         | %         | %                     |
| Number of employees               | Full-time | Part-time | Santa Maria Residents |
|                                   |           | %         | %                     |
| Number of jobs created by project | Full-time | Part-time |                       |

**SITE INFORMATION**

|                                                             |                                          |                 |
|-------------------------------------------------------------|------------------------------------------|-----------------|
| _____<br>Building Size                                      | _____<br>Lot Size                        | _____<br>Zoning |
| <input type="checkbox"/> Own <input type="checkbox"/> Lease | If lease, term remaining on lease: _____ |                 |

If lease, name of property owner contact: \_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

Does proposed project require any kind of zone change or Conditional Use Permit?  Yes  No If yes, explain:

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## ATTACHMENTS

Include the following exhibits:

- Exhibit I: Detailed description of the proposed project including cost summary.
- Exhibit II: Business Tax returns, along with Income and expense statements, for past three years.
- Exhibit III: Copy of the most recent business financial statement.
- Exhibit IV: Schedule of Business Fixed Debt (Form included).
- Exhibit V: Personal Tax Returns, for the past three years.
- Exhibit VI: Personal Financial Statement (Form included).
- Exhibit VII: Resume of Principals.
- Exhibit VIII: Business Plan

I certify to the best of my knowledge that the above information and attachments are correct. I understand that funds are limited and acceptance of application does not guarantee a funding commitment or project approvals from the Business Retention & Attraction Loan Program. I authorize Coastal Business Finance to obtain all the necessary credit reports (business and personal) and inquiries to verify the accuracy of the above statements and to determine creditworthiness pertaining to this loan request.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title