

# URBAN REVITALIZATION AGENCY (URA) RLF LOAN APPLICATION

## Request Overview

Requested Loan Amount: \$ \_\_\_\_\_

Purpose of Requested Funds (check all that apply):  Land/Building Acquisition  Soft Costs & Misc.  
 Renovation & Improvements  Debt Consolidation  
 Other (please describe) \_\_\_\_\_

Please provide a brief 1-2 sentence description of your project: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Operating Company

Company Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Principal in charge \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_ Cell Phone (\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

Type of Business \_\_\_\_\_ Date Established \_\_\_\_\_

Type of Entity (check one)  Proprietorship  Partnership  LLC  S-Corp  C-Corp

Federal Tax ID # \_\_\_\_\_

Company Ownership	Name	_____	% Ownership	_____
	Name	_____	% Ownership	_____
	Name	_____	% Ownership	_____
	Name	_____	% Ownership	_____

## Holding Company

*(if Real Estate held separately) – if property held personally, please indicate name here*

Company Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Principal in charge \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_ Mobile Phone (\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

Federal Tax ID # \_\_\_\_\_ Date Established \_\_\_\_\_

Type of Entity (check one)       Proprietorship     Partnership     LLC     S-Corp     C-Corp

Company Ownership      Name \_\_\_\_\_ % Ownership \_\_\_\_\_

Name \_\_\_\_\_ % Ownership \_\_\_\_\_

Name \_\_\_\_\_ % Ownership \_\_\_\_\_

Name \_\_\_\_\_ % Ownership \_\_\_\_\_

## Project Information

### Project Location:

Is this project:     Commercial     Residential     Mixed-Use     Vacant Land

Street address of project \_\_\_\_\_

Tax Parcel # (if known) \_\_\_\_\_

Est. Total Building Square footage \_\_\_\_\_

Est. Project Square footage \_\_\_\_\_

### Project Background:

#### Project Uses of Funds

Purchase & Acquisition price..... \$ \_\_\_\_\_

Construction (*New Construction*) .... \$ \_\_\_\_\_

Remodel/Renovation (*Existing*)..... \$ \_\_\_\_\_

Machinery & Equipment\*..... \$ \_\_\_\_\_

Furniture & Fixtures\*..... \$ \_\_\_\_\_

Design, permits, other soft costs..... \$ \_\_\_\_\_

Other & Misc.\*..... \$ \_\_\_\_\_

**Total Project Cost\*** \$ \_\_\_\_\_

*\*Note: URA financing may not be eligible for all project uses*

#### Project Sources of Funds

Have you applied for a loan from a bank?\*     Yes     No

If yes, what bank? \_\_\_\_\_

Are you applying for a URA grant?     Yes     No     Unsure

If yes, how much? \_\_\_\_\_

Do you have other sources of funding?  Yes     No     Unsure

If yes, what sources? \_\_\_\_\_

**\*Note: URA Loans require that all applicants request financing from a minimum of 1 bank. See URA staff for additional details.**

### Additional Questions:

Are all real estate taxes current?.....  Yes     No     Unsure

Is the property insured/ have you received bids?.....  Yes     No     Unsure

Does the property have asbestos, lead-paint, or other hazardous materials?...  Yes     No     Unsure

If yes, which hazardous materials? \_\_\_\_\_

Have you received all required permits from Butte-Silver Bow?.....  Yes     No     Unsure

Does/ will the property be managed by a 3<sup>rd</sup>-party property manager?.....  Yes     No     Unsure

If yes, who will manage property? \_\_\_\_\_

Have you met with the Butte-Silver Bow Historic Preservation Officer?.....  Yes     No     Unsure

## Employees

(Commercial and/or Mixed-Use Projects Only)

Will this project support the retention or creation of new jobs?  Yes  No  Unsure

Number of Current Employees: Full Time \_\_\_\_\_ Part Time \_\_\_\_\_

Estimated number of employees in two years as a result of this project: Full Time \_\_\_\_\_ Part Time \_\_\_\_\_

## Miscellaneous Questions

Have you or any officer of your company ever been involved in bankruptcy or insolvency proceedings?  Yes  No  Unsure

Are you or your business involved in any pending or prior lawsuits?  Yes  No  Unsure

*\*If yes, please provide details on a separate sheet*

Have you or an affiliated business ever received a loan or grant from Butte Silver Bow?  Yes  No  Unsure

Original Loan/Grant Amount \$ \_\_\_\_\_ Date of loan or grant \_\_\_\_\_

Current Balance \$ \_\_\_\_\_ Status \_\_\_\_\_

## Document Checklist

### Business Information

	Business financial statements for last 3 years Along with A/R and A/P Aging reports
	Business tax returns for last 3 years
	Business debt schedule (form attached)
	Three years projected income statement with assumptions
	Interim financial statements within last 60 days

### Legal Entity Documents (as applicable)

	Sole Proprietorship – Assumed Business Name filing
	Corporation – Articles of Incorporation & Corporate By-Laws
	LLC – Articles of Organization & Operating Agreement
	Partnership – Partnership Agreement

### Personal information (for each 20% owner)

	Personal tax returns for last 3 years
	Personal Financial Statements (form attached)
	Personal Resume (form attached)

### Real Estate Information

	Real Estate Purchase Agreement or Settlement Statement
	Construction cost budgets and / or bids
	Environmental Reports (form attached)
	Appraisal, CMA, or other valuation
	Rent Roll or Schedule of Rents

**\*\*All financial statements must be signed and dated by the applicants – please sign front page of all financials (tax returns, interim statements, personal financial, etc.)**

## Authorization to Release Information

I/We hereby authorize any financial corporations, insurance companies, investors, credit bureaus, employers, banks, etc. to release any and/or all information on my/our records and/or accounts to Butte Silver Bow Community & Economic Development and its agents at their request.

I/We also authorize any information to be released by my/our original or photocopied signature.

I/We hereby certify that the enclosed information, including any attachments or exhibits provided here within or at a later date, is valid and correct to the best of my/our knowledge.

Applicant: \_\_\_\_\_ Date: \_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

Co-Applicant: \_\_\_\_\_ Date: \_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

# PERSONAL RESUME

To be completed by each principal involved in the loan. Please make additional copies as needed.

Name \_\_\_\_\_ SS# \_\_\_\_\_  
First Middle Last

Date of Birth \_\_\_\_\_ Place of birth \_\_\_\_\_

Home address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

From \_\_\_\_\_ To \_\_\_\_\_ Home phone \_\_\_\_\_ Business phone \_\_\_\_\_

Spouse Name \_\_\_\_\_ SS# \_\_\_\_\_  
(If Guarantor) First Middle Last

Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_

## Personal Information

Are you a U.S. citizen? (If no, please provide a copy of your Alien Registration or Visa Card).....  Yes  No

Are you or a spouse currently employed by Butte- Silver Bow?  
(If yes, furnish details in separate exhibit) .....  Yes  No

Are you a veteran of the U.S. Armed Forces?.....  Yes  No

Are you presently under indictment, on parole or probation?  
(If yes, furnish details in separate exhibit. List name(s) under which held, if applicable.).....  Yes  No

Have you ever been charged with or arrested for any criminal offense other than a minor motor vehicle violation?  
(If yes, furnish details in separate exhibit. List name(s) under which held, if applicable.).....  Yes  No

Have you ever been convicted of any criminal offense other than a minor motor vehicle violation?  
(If yes, furnish details in separate exhibit. List name(s) under which held, if applicable.).....  Yes  No

# BUSINESS DEBT SCHEDULE

Make Additional Copies as Needed

Urban Revitalization Agency Template

Furnish the following information on all installment debts, contracts, notes,  
And mortgages payable. Do not include accounts payable or accrued liabilities.

Date \* \_\_\_\_\_

Creditor Name/Address	Original Amount	Original Date	Present Balance	Interest Rate	Maturity Date	Monthly Payment	Security/Collateral	Current or Delinquent?
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
	\$		\$			\$		
<b>TOTAL PRESENT BALANCE **</b>			\$	<b>TOTAL MONTHLY PAYMENT</b>		\$		

\*Should be the same date as current financial statement

\*\*Total must agree with balance shown on current financial statement

# RENT ROLL

Make Additional Copies as Needed

Urban Revitalization Agency Template

Property Address: \_\_\_\_\_ Total Units: \_\_\_\_\_

Property Owner: \_\_\_\_\_ Total Finished Units: \_\_\_\_\_ As of (date): \_\_\_\_\_

Unit #	Commercial or Residential (C/R)	Tenant (Write "Vacant" if Currently Unoccupied)	Sq. Ft.	Lease Start (Date)	Lease Expiration (Date)	Monthly Rent	Notes/ Other Lease or Expense Arrangements
						\$	
						\$	
						\$	
						\$	
						\$	
						\$	
						\$	
						\$	
						\$	
						\$	
<b>TOTAL MONTHLY RENT</b>						<b>\$</b>	

I/We certify that the rent roll dated for the above is true and correct.

By: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_