Intake Form

Community Concepts Finance Corporation
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Community Concepts Finance Corp is a U.S. Treasury certified Community Development Finance Institution (CDFI) that uses Federal and State funds. For this reason we are required to collect the following demographic and impact assessment information.

Business Information

Name of Business: _____ Tax ID # _____

Business Address: _____ Phone# _____

City: _____ State _____ Zip: _____ County: _____

Legal Entity: **O** Sole Proprietor **O** Partnership **O** LLC **O** Corporation **O** Other

Length of Business Ownership: _____ Yrs. **OR** **O** Startup Percent of Ownership* _____

Previous Year Gross Income: _____ Previous year Net Income: _____

Current Annual Payroll Expense: _____ Number of Full Time Employees: _____ Part time: _____

***Each individual owning 20% or more of the business must complete a separate form.**

Personal Information

Applicant Name: _____ Date of Birth: _____

Home Address: _____ Soc Sec #: _____

City: _____ State _____ Zip: _____ Household Income: _____

Marital Status: **O** Married **O** Unmarried (single/divorced/widowed) Number in Household: _____

Email Address: _____ Phone Number: _____

O Female **O** Male	**Veteran Status**	**Race/Ethnicity**	
Business Income is:	**O** Non Veteran	**O** Black	**O** Asian/Pacific
O Supplementary Income	**O** Vietnam Veteran	**O** Hispanic	**O** Native/Eskimo
O Sole Source of Income	**O** Other Veteran	**O** White	**O** Other

Legal History

Have you ever been convicted of a Felony? **O No** **O** Yes, Type & Date Filed: _____

Do you have any collection items, child support payments, judgments, or unpaid taxes (personal or business **O** No **O** Yes

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

Are you a US citizen? O No O Yes Are you a permanent resident alien O No O Yes

Business Detail

What Assistance are you seeking? **O** Business Loan **O** Business Counseling **O** Technical Assistance

Business Description: _____

Specific Needs: _____

Have you received business counciling in the past?: _____ If yes, by whom?: _____

Do you have a current depository banking relationship?: _____ If yes, with whom?: _____

How did you hear about us?: _____