

RELIGIOUS ORGANIZATION INFORMATION SHEET

A. General Information

(If more space is required, please feel free to attach an additional sheet)

1. Name of Organization: _____
2. Address of Organization: _____
3. Phone Number: _____
4. Main Contact: _____
5. What is the legal structure (i.e., corporation) _____
6. What is the tax ID#? _____
7. Inception date of organization? _____
8. How long have you been at your current location? _____
9. How many worship services are held? Per day _____ Per week _____ or Per month _____

10. Is there a formal tithing policy? _____
11. When are offerings collected? Daily ___ Weekly ___ Monthly ___
12. What is the seating capacity of your facility? _____
13. Names of Clergymen:

Pastors / Ministers:	Title:	Yrs in Office:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

14. Member of Denominational Body? Yes ___ No ___
15. If yes, which one? _____
16. If yes, how is the body structured? _____
17. If yes, how much does your organization contribute directly to the denominational body annually? _____
18. Committee/person in charge of financial related decisions?

Official Title	Yrs in Office	Months	Secular Emp.
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

19. What committee/persons are in charge of other decisions _____
- _____
- _____
- _____

B. Financial Information:

For questions 1 – 6, please list requested information for the last 5 year

Year	_____	_____	_____	_____	_____
1. Operating Budget	_____	_____	_____	_____	_____
2. Actual Operating Income	_____	_____	_____	_____	_____
3. Membership Figures	_____	_____	_____	_____	_____
4. Giving Units (family units or single adults)	_____	_____	_____	_____	_____
5. Avg. Worship Attendance	_____	_____	_____	_____	_____
6. Avg. Sunday School Attendance	_____	_____	_____	_____	_____
7. Breakdown of current membership:					
under 18	_____				
18 – 30	_____				
30 – 60	_____				
over 60	_____				

(Note: if your organization has a breakdown in alternate age groupings, please use that grouping)

- 8. Average family income of membership? _____
- 9. When was the last date your membership rolls were purged? _____
- 10. Are you past due or have been past due on any financial obligation during the last 3 years? Yes__ No__
- 11. If yes, give details. _____
Are any members of your church going to receive loan proceeds? Yes__ No__
- 12. If yes, give details. _____

C. Property Information:

- 1. How many acres do you own? _____
- 2. What is the square footage of your facilities? _____
- 3. What date did you acquire your facilities and at what cost? _____
- 4. How many acres currently occupied by your facilities? _____
- 5. Please list a description, the year completed, and the construction costs of any improvements:

- 6. Has the property been appraised? Yes__ No__ Date: _____ Value: _____ Appraiser:

- 7. Insurance Coverage? Yes__ No__
- 8. If yes, amount: _____
- 9. Who holds title? _____

D. Project Information:

1. Please provide a description of the current project _____

2. Who is your architect? _____
3. What is the total cost of the project? _____
 - a. Construction _____
 - b. Soft Costs _____
 - c. Furniture/fixtures _____
 - d. Contingency _____
 - e. Interest carry during construction _____
 - f. Total Estimated Cost _____
4. What is the estimated length of construction? _____
5. How much cash is available for the project? _____
6. Are you/will you be involved in a special fund raising campaign for this project? Yes__ No__
If yes, what is the start date? _____
If yes, what is the length of the campaign? _____
If yes, how much is pledged to date? _____
If yes, any pledges over \$25,000? Yes__ No__
If yes, any pledges over \$50,000? Yes__ No__
If yes, any pledges over \$100,000? Yes__ No__
Did you use a professional fundraiser? Yes__ No__
If yes, which one? _____

E. Loan Information:

1. What is the amount of the loan being requested? _____
2. Is Board of Trustees action necessary for this loan? Yes__ No__ (If Yes attach resolution)
3. Is congregation's approval necessary for this loan? Yes__ No__ (If Yes attach resolution)

F. Additional Information Needed:

1. Resume from Head Clergyman
2. Brief history of the organization
3. Last three years fiscal year end financial statements (income statements & balance sheets) – preferably CPA prepared
4. Most recent interim financial statements (combined operating and restricted) (income statements & balance sheets)
5. Copy of your latest budget
6. If available, copy of architect's and contractor's contract (if applicable)
7. Operating budget projections for the next 3 years