

Questionnaire for Religious Organizations

Name of Organization: _____

Street Address: _____

City, State, ZIP: _____

Contact Person: _____

Phone Number: _____

ABOUT YOUR ORGANIZATION	
Date Founded:	
Time at this Location:	
Tax ID Number:	
State & Date of Incorporation:	
Governing Body of Organization (Board of Trustees, Operating Committee, etc.):	
National Affiliation(s) (Yes or No) (if "Yes", please list denomination)	
Annual Contributions to Governing Body or National Affiliation(s):	
Where does asset ownership reside (i.e. corporate entity, board of trustees, etc.)?	

MEMBERSHIP & ATTENDANCE			
List membership for the last 3 years	Current	Last Year	Two Yrs Ago
Number of Families (Giving Units)			
Total Number of Members			
Members under 18			
Members 18-30			
Members 31-60			
Members over 60			
Last date your membership records were purged:			
Days & Times of Worship Services:			
Average Weekly Attendance:			
Current Worship Facility Seating Capacity:			

LEADERSHIP			
Name of Head Clergy/Leader & Key Staff	Position/Title	Years with Organization	Years of Experience

PROPOSED PROJECT / FUNDING NEED (to be completed if applicable)	
Total Project Cost or Asset Cost	\$
Cash equity to be provided by borrower	\$
Proceeds from proposed loan	\$
Cash (not borrowed monies) already contributed to project or asset cost	\$
Other cash & investments available	\$
Fundraising	
Indicate dates of fund raising campaign:	
Total number of members making pledges:	
Total amount pledged to date:	\$
Total amount of pledges received to date:	\$
Term over which pledges will be received:	mths
Has the organization been involved in a project fundraiser previously? (if so, please provide details such as the questions noted above).	
IF NEW CONSTRUCTION IS INVOLVED, PLEASE ANSWER THE FOLLOWING:	
Will the construction be at the present location or a new location? (If at new location, what is the distance from the current location?)	
Please describe the project:	
Complete address of new project:	
Please provide a copy of construction proposal / contract with the general contractor of the project.	

All loan requests from a religious organization require the following financial information:

- A minimum of three years of financial statements.
- A minimum of three years of Church tax returns, if filed.
- Interim year-to-date financial statements (if year-end numbers older than five months).
- A copy of the current year's budget.
- Articles of Incorporation / By-Laws.
- Minutes of Trustee Board meetings discussing repairs to be completed and authorizing approval of repairs or construction, if applicable.
- Copy of cost estimate (Construction Proposal / Contractor Contract if available).



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