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BRIDGE TO BANKABLE PROGRAM
Client Interview Form

Instructions: To submit the form, fax this signed form to (800) 381-9586 or call (832) 559-0550 or send email to: ervin@rainstarcapitalgroup.com

Partner Name: _____

Business: _____

Address: _____

Cell Phone: _____

Capital/Credit Request: (\$) _____

Products or Services Sold: _____

Describe how the business financing will be used? _____

Owner Name: _____

City: _____ State: ____ Zip: _____

Email: _____

Date Company Started: _____

① ELIGIBILITY QUESTIONNAIRE

Owner Personal Eligibility Questions	Answers	Business Eligibility Questions	Answers
1. Is your personal credit score over 720?	[] YES [] NO	7. Is the company currently an LLC or Corporation?	[] YES [] NO
2. Do you have ANY prior criminal history?	[] YES [] NO	8. Does the company use QuickBooks or other system?	[] YES [] NO
3. Are you delinquent on ANY personal taxes?	[] YES [] NO	9. Does the company accept credit cards for payment?	[] YES [] NO
4. Do you have any unpaid judgments or tax liens?	[] YES [] NO	10. Does the company invoice its customers?	[] YES [] NO
5. Do you have any defaulted child support or loans?	[] YES [] NO	11. Does the company have a DUNS Number?	[] YES [] NO
6. Have you EVER filed any bankruptcy?	[] YES [] NO	12. Did the company gross over \$250,000 last year?	[] YES [] NO

② AVAILABLE DOCUMENTATION (Check all that apply.)

Do you currently have supporting documents like:	Answers	Company Owned Collateral Available	Answers
1. Last (6) months of business bank statements	[] YES [] NO	7. Commercial Real Estate	[] YES [] NO
2. QuickBooks or accounting A/R Aging Reports	[] YES [] NO	8. Business or Commercial Equipment	[] YES [] NO
3. Last (3) years of business tax returns	[] YES [] NO	9. Government or Corporate Accounts Receivable	[] YES [] NO
4. Last (3) years of personal tax returns	[] YES [] NO	10. Government or Corporate Purchase Orders	[] YES [] NO
5. Current business debt schedule	[] YES [] NO	11. Owner's 401(k) Account	[] YES [] NO
6. Copies of government or corporate contracts	[] YES [] NO	12. No Collateral Available	[] N/A

③ EXERCISE – ESTIMATE YOUR LOAN ROI (Over the Next 24 Months.)

Give an estimate (projection) on how much in GROSS SALES you expect to earn if approved for funding?	\$
How much do you typically MARK UP your products or services to customers? (Check only one.)	[] 20% [] 30% [] 50% +
Calculate: Gross Sales x Percent Markup = <i>OPERATING PROFIT</i>	\$
Calculate: Total Loan Principal + Total Interest Paid = <i>TOTAL BORROWED INVESTMENT</i>	\$
Calculate: Operating Profit / Total Borrowed Investment = (ROI) <i>RETURN ON BORROWING</i>	%

Signed by: _____

Funding Needed by: _____

Print Client Name _____

Name of Client Firm _____

Date _____