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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](mailto:ervin@rainstarcapitalgroup.com)

Partner Name: \_\_\_\_\_

Business: \_\_\_\_\_

Owner Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_ Zip: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Capital/Credit Request: (\$) \_\_\_\_\_

Date Company Started: \_\_\_\_\_

Products or Services Sold: \_\_\_\_\_

Describe how the business financing will be used? \_\_\_\_\_

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

Signed by: \_\_\_\_\_

Funding Needed by: \_\_\_\_\_

Print Client Name

Name of Client Firm

Date