



**McPherson Commercial Capital, LLC**  
Capital and Funding for Equipment, Real Estate and Working Capital • Consulting

C U S T O M E R   P R O F I L E  
F I N A N C I N G

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OBLIGOR / APPLICANT INFORMATION

Section A

LEGAL ENTITY NAME \_\_\_\_\_

TYPE OF ENTITY       C-CORP       S-CORP       LLC       LP       GP

ADDRESS \_\_\_\_\_

CONTACT NAME \_\_\_\_\_ TITLE \_\_\_\_\_

FEDERAL TAX ID \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_ FACSIMILE NUMBER \_\_\_\_\_

DESCRIPTION OF BUSINESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ # YEARS UNDER PRESENT OWNERSHIP \_\_\_\_\_

OWNERSHIP STRUCTURE

NAME \_\_\_\_\_ OWNERSHIP \_\_\_\_\_

NAME \_\_\_\_\_ OWNERSHIP \_\_\_\_\_

NAME \_\_\_\_\_ OWNERSHIP \_\_\_\_\_

NAME \_\_\_\_\_ OWNERSHIP \_\_\_\_\_

COMPANIES WITH COMMON OWNERSHIP

NAME \_\_\_\_\_ NAME \_\_\_\_\_

NAME \_\_\_\_\_ NAME \_\_\_\_\_

GUARANTOR INFORMATION

NAME \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_

ADDRESS \_\_\_\_\_ TELEPHONE # \_\_\_\_\_

NAME \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_

ADDRESS \_\_\_\_\_ TELEPHONE # \_\_\_\_\_

NAME \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_

ADDRESS \_\_\_\_\_ TELEPHONE# \_\_\_\_\_

ASSETS TO BE FINANCED/LEASED Describe (Attach schedule if available): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

DESIRED TRANSACTION TERMS: LOAN  LEASE  TERM: \_\_\_\_\_ RATE: \_\_\_\_\_

END OF LEASE PURCHASE OPTION: \_\_\_\_\_

END OF LEASE RENEWAL OPTION (If Applicable): \_\_\_\_\_

ACCEPTED PROPOSAL AND COMMITMENT FEE ATTACHED: YES  NO  IF NOT, EXPLAIN WHY: \_\_\_\_\_

Credit Authorization: The undersigned Obligor / Applicant warrants that all credit information submitted to McPherson Commercial Capital, LLC ("MCC"), and its assigns is true and correct and that all credit information to be submitted to MCC and its assigns will be true and correct. You authorize them and their assigns to make credit investigations and to obtain credit reports and other financial information, written or oral, in regards to the financial position of the Obligor, any affiliates and any guarantors.

OBLIGOR/APPLICANT:

McPherson Commercial Capital, LLC    PHONE (734) 429-2524    FAX (734) 527-6106

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By: \_\_\_\_\_ By: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_

TRADE REFERENCES

Section B

Applicant: Upon completion of section B, please return with completed Customer Profile to, McPherson Commercial Capital, LLC. Upon receipt, we will forward this form to the appropriate supplier. We require three (3) references. Please make additional copies as needed.

APPLICANT'S NAME \_\_\_\_\_

SUPPLIER'S NAME \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_ FACSIMILE NUMBER \_\_\_\_\_

SUPPLIER'S CONTACT PERSON \_\_\_\_\_

COMPANY'S NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

ACCOUNT NUMBER \_\_\_\_\_

X \_\_\_\_\_

SIGNATURE AUTHORIZATION FOR RELEASE OF ACCOUNT INFORMATION

DATE

TRADE REFERENCES

Section C is to be completed by the Supplier only.

Section C

The stated applicant hereby gives permission to disclose the account history with your company to McPherson Commercial Capital, LLC ("MCC"), and/or its assigns for the purposes of this credit verification. This information is to be used in consideration of granting a lease/loan to the Applicant. Upon completion, please fax to MCC .

DATE OPENED \_ / \_ / \_\_\_\_\_

HIGH CREDIT \_\_\_\_\_

CURRENT CREDIT \_\_\_\_\_

TERMS \_\_\_\_\_

PAST DUE \_\_\_\_\_

PAYMENT HISTORY \_\_\_\_\_

PRODUCT SUPPLIED \_\_\_\_\_

X \_\_\_\_\_

SIGNATURE AUTHORIZATION FOR RELEASE OF ACCOUNT INFORMATION

DATE

**FINANCIAL REFERENCES**

**Section D**

Applicant: upon completion of section D, please return with completed Customer Profile. Upon receipt, we will forward this form to the appropriate institution. Please make additional copies as needed.

APPLICANT'S NAME \_\_\_\_\_  
 BANK NAME \_\_\_\_\_  
 ACCOUNT OFFICER \_\_\_\_\_  
 TELEPHONE NUMBER \_\_\_\_\_ FACSIMILE NUMBER \_\_\_\_\_  
 LOAN ACCOUNT NUMBERS \_\_\_\_\_  
 DEPOSITORY ACCOUNT NUMBERS \_\_\_\_\_  
 COMPANY'S NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_

X \_\_\_\_\_  
 SIGNATURE AUTHORIZATION FOR RELEASE OF ACCOUNT INFORMATION DATE

**FINANCIAL REFERENCES**

(Section E is to be completed by the bank or lender only)

**Section E**

The above stated applicant hereby gives permission to disclose the account history with your financial institution and copies of all financial information furnished to it by the undersigned to McPherson Commercial Capital, LLC ("MCC"), and/or its assigns for the purposes of this credit verification. This information is to be used in consideration of granting a lease/loan to the applicant. Upon completion, please fax to MCC.

DEPOSITORY ACCOUNTS _____	LOAN ACCOUNTS _____
OPENING DATES _____	OPENING DATES _____
AVERAGE BALANCES _____	HIGH CREDIT _____
NUMBER OF NSF'S _____	CURRENT BALANCE _____
STATUS _____	PAYMENT HISTORY _____
_____	TYPE _____
REPRESENTATIVE _____	MATURITY _____
TITLE _____	COLLATERAL _____
_____	PAYMENT HISTORY _____

PLEASE SUBMIT THE FOLLOWING INFORMATION:

Section F

- A Completed Customer Profile
- Audited or reviewed company financial statements for the three most recent fiscal years for Obligor and any Guarantor(s). Financial statements must be prepared on an accrual basis and according to GAAP
  - FY Ending / /
  - FY Ending / /
  - FY Ending / /
- If not audited or reviewed, please provide company tax returns in addition to the accrual financial statements.
- Obligor's and any Guarantor's most recent interim financial statements and comparable interim financial statements for prior year
  - Period Ending / /
  - Prior Period Ending / /
- Personal financial statements of individual guarantors and personal tax returns for most recent two years
- Description of the Business
- Twelve-month projections of operations related to new equipment need, if applicable
- Background information resumes on owners and operators
- Debt Schedule of Obligor if financial statements not reviewed or audited

PLEASE RETURN TO THE FOLLOWING ADDRESS:

Section G

MCPHERSON COMMERCIAL CAPITAL, LLC  
P.O. Box 351  
Saline, MI 48176  
[info@mcphersoncc.com](mailto:info@mcphersoncc.com)

F I N A N C I N G

DEBT SCHEDULE FOR OBLIGOR AS OF / /

Section H

Please make additional copies as needed.

LENDER \_\_\_\_\_  
 LOAN TYPE \_\_\_\_\_  
 ORIGINAL LOAN AMOUNT \_\_\_\_\_ \$ \_\_\_\_\_  
 INTEREST RATE \_\_\_\_\_  
 MONTHLY PAYMENT \_\_\_\_\_ \$ \_\_\_\_\_  
 COLLATERAL \_\_\_\_\_  
 UNIT ADDRESS \_\_\_\_\_  
 ORIGINATION DATE / / \_\_\_\_\_  
 ORIGINAL TERM \_\_\_\_\_  
 BALANCE \_\_\_\_\_ \$ \_\_\_\_\_

LENDER \_\_\_\_\_  
 LOAN TYPE \_\_\_\_\_  
 ORIGINAL LOAN AMOUNT \_\_\_\_\_ \$ \_\_\_\_\_  
 INTEREST RATE \_\_\_\_\_  
 MONTHLY PAYMENT \_\_\_\_\_ \$ \_\_\_\_\_  
 COLLATERAL \_\_\_\_\_  
 UNIT ADDRESS \_\_\_\_\_  
 ORIGINATION DATE / / \_\_\_\_\_  
 ORIGINAL TERM \_\_\_\_\_  
 BALANCE \_\_\_\_\_ \$ \_\_\_\_\_

LENDER \_\_\_\_\_  
 LOAN TYPE \_\_\_\_\_  
 ORIGINAL LOAN AMOUNT \_\_\_\_\_ \$ \_\_\_\_\_  
 INTEREST RATE \_\_\_\_\_  
 MONTHLY PAYMENT \_\_\_\_\_ \$ \_\_\_\_\_  
 COLLATERAL \_\_\_\_\_  
 UNIT ADDRESS \_\_\_\_\_  
 ORIGINATION DATE / / \_\_\_\_\_  
 ORIGINAL TERM \_\_\_\_\_  
 BALANCE \_\_\_\_\_ \$ \_\_\_\_\_

LOAN TYPE: EG TERM LOAN, REVOLVING LINE OF CREDIT, CAPITAL LEASE

COLLATERAL: COLLATERAL SECURING THE LOAN