

| GREEK HOUSE Loan Questionnaire |
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| **Organizational Information** |
| Name of Fraternity, Sorority (National Organization): |
| Local Chapter: | Date Founded: | Tax ID Number: |
| Current Physical Address of Chapter: |
| City: | State: | ZIP Code: |
| Phone #: | Length of Time at Location:  | Owned / Rented (Please circle) |
| How long has chapter house been a recognized organization on its specific campus?  |
| Is the Chapter House currently in good standing? |
| Has the Chapter House ever been in bad standing with the National Organization or University? (If yes, provide documentation explaining the reason)\*\*: |
| Does the National Organization provide financial support? |
| If current facility is rented, please provide monthly rental fee and maturity of lease: |
| Who will be the primary contact for this request: |
| **MEMBERSHIP Information** |
| Total current active members: | Live ins: | Live outs (Social Members): |
| Other (please explain): |
| Total monthly cost for a live in:  | Total monthly cost for a live out: |
| Total monthly cost for other member type (if applicable): |
| Number of members 1 year ago: | Number of members 2 years ago: | Number of members 3 years ago: |
| When was the membership data last purged? |
| Breakdown of members (% of fraternity/sorority members) |
| Freshmen %: | Sophomores %: | Juniors %: | Seniors %: |
| Number of Local Chapter Alumni: | When was alumni data last purged: |
| **FINANCIAL INFORMATION** |
| Annual budgeted revenue: | Annual budgeted expenses: |
| Are you currently in a fundraising campaign: | Start Date: | End Date: |
| Amount of pledges given: | Amount of pledges collected: |
| Anticipated final pledge collections: | Below please list the amounts given by the 10 largest givers: |
| How many campaigns has the organization held in the past: | What has been the historic pledge collection %: |
| Who is managing the pledge campaign: |  |
| Name of current Bank(s):  |
| **Loan Request** |
| Nature of request (Purchase, Construction, Remodeling, Refinance, etc): |
| Amount of loan requested: | Amount of cash available for down payment: |
| Preferred amortization (in years): | Date funds will be needed: |

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| **Existing Building information (If Owned)** |
| Year constructed: | Year of last significant renovation: | Square feet: |
| Living capacity and occupancy: | Value:  | Source (Appraisal, Assessor, Estimate): |
| Is there a first lien against the property:  | Balance: | Lender: |
| Interest Rate: | Monthly Payment: | Maturity Date: |
| Is there a second lien against the property: | Balance: | Lender: |
| Interest Rate: | Monthly Payment: | Maturity Date: |
| **Proposed Project (If applicable)** |
| Address: |
| Project Budget: | Anticipated Living Capacity: | Anticipated Occupancy: |
| Architect:  | Builder: |
| Value after Project:  | Source (Appraisal, Assessor, Estimate, etc): |
| $ spent on project to date : |
| **Along with this questionnaire please provide the following information** |
| - A minimum of three years of financial statements |
| - Year-to-date financial statements |
| - If not included in financial statements, please provide a separate report detailing revenue sources (i.e. revenue from live-ins and live-outs, campaign funds, national organization support, university support, etc.) |
| - If applicable, please provide a breakdown of board member’s salaries |
| - Copy of current year’s budget |
| - Copy of construction budget, along with a list of preliminary project costs that have already been paid (If applicable) |
| - Updated report of pledges received and collected (If applicable) |
| - Copy of articles of incorporation / By-laws |
| - Copy of any existing financial commitments (If Applicable) |
| - Copy of architect or engineer plans (If Applicable) |
| - \*\*Copy of statement detailing reasoning for bad standing (if applicable) |