

| 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) | | | | | | | | | |