

Consumer Financing- General Client Information

Company Name: _____ d/b/a _____

Address _____ City _____ St/Zip _____

Phone (_____) _____ Fax (_____) _____

Owners Name(s) _____ (%_____)

_____ (%_____)

Contact person _____ Title _____

Best Phone # to reach (_____) _____ Email _____

Website address _____

Length of time in business: _____ Number of locations: _____

Description of products/services sold: _____

Length of time before product/service is fully delivered (include any promised support and/or guarantees):

How is product/service sold to consumers: ___ In the home ___ In your office ___ Retail store ___ Internet
___ Door-to-door ___ Print ads ___ Direct Mail ___ Catalog ___ TV ___ In-bound phone ___ Telemarketing
___ Other, please elaborate _____

What is the profile of your customer: _____

In which states do you sell your product/service? _____

SALES INFORMATION

Profit margin/mark-up in product or service _____%

Current monthly sales volume (all payment types) \$ _____

Total dollar amount in financed sales per month (or anticipated sales) \$ _____

Avg. Sale amount \$ _____ Down payment \$ _____

Avg. Contract/financed amount \$ _____

FINANCING INFORMATION

Program requested (select all that apply):

___ Installment financing ___ Bulk portfolio purchase ___ Loan servicing only ___ Bad debt collections

Do you currently offer a financing program: ___ Yes ___ Yes, In-house ___ No

If yes, do you currently sell these receivables: ___ Yes ___ No

Will we ___ replace or ___ work in conjunction with your current financing program?

Finance co. _____ Discount % ___ Reserve % held: ___ Interest rate ___%

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What is the principal balance of your current receivables portfolio \$ _____

How much of that portfolio is delinquent (90 days or more past due) \$ _____

What do you do with delinquent accounts or write offs: _____

Do you check credit prior to extending financing: ___ Yes ___ No

Which credit reporting agency do you use: ___ Experian ___ Trans Union ___ Equifax

Terms offered (or would like to offer) Circle all that apply: 90 day same as cash, 6, 12, 24, 36, 48, 60 months

Other _____

Current Interest rate charged % _____ (if applicable)

Other comments regarding financing program (either existing or what you desire in a program):

Will you need retail installment contracts supplied: ___ Yes ___ No

Are company financial statements prepared: ___ Yes ___ No How often: _____

Has there been a recent change (within last two years) of majority shareholders and/or officers? ___Yes ___No

If yes, please provide details _____

Have you or your company ever filed for bankruptcy: ___ Yes ___ No

If yes, please provide details _____

Principal(s) personal credit? ___Fair ___Good ___Excellent

Explain any problem areas: _____

Are company principals willing to personally guarantee receivable purchases if necessary ? ___ Yes ___ No

Have you had any complaints filed against the company with the Better Business Bureau or the Attorney General?

___Yes ___ No If yes, please explain: _____

Has your company ever been involved in litigation ___Yes ___No If yes, please explain: _____

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