



IOWA UNITED METHODIST CHURCH BUILDING FUND TRUST
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Please note: Do not leave any questions blank. If the question does not apply to you, please mark it Not Applicable (N/A). Any blank spaces may result in a delay in processing your application. If you have any questions at any time, please call us. Once you have completely filled out the information, please print it out, sign and return with any required documentation. We look forward to serving you. Thank you!

LOAN APPLICATION

A. GENERAL INFORMATION

(If more space is required, please feel free to attach an additional sheet)

1. Name of Organization: _____

2. Address of Organization: _____

3. Phone Number: _____

4. Email Address: _____

5. Main Contact: _____

6. What is your tax I.D. #? _____

7. How long have you been at your current location? _____

8. How many worship services are held per week? _____

9. What is the name of your bank? _____

10. Current bank balance: Savings: _____ Checking: _____

11. Other Investments:

Institution

Type of Account

Balance

<u>Institution</u>	<u>Type of Account</u>	<u>Balance</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

12. What is the seating capacity of your facility? _____

13. Names of Clergy:

<u>Pastors</u>	<u>Title</u>	<u>Yrs. In Office</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

14. Were the churches apportionments for the prior year paid in full? _____

15. Committee/person in charge of financial related decisions?

<u>Officials</u>	<u>Title</u>	<u>Yrs. In Office</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. FINANCIAL INFORMATION

For questions 1-6, please list requested information for the last four years.

YEAR	<u>20</u>	<u>20</u>	<u>20</u>	<u>20</u>
1. Operating Budget Income	_____	_____	_____	_____
2. Operating Budget Expense	_____	_____	_____	_____
3. Actual Operating Income	_____	_____	_____	_____
4. Actual Operating Expense	_____	_____	_____	_____
5. Membership Figures	_____	_____	_____	_____
6. Giving Units*	_____	_____	_____	_____
7. Average Worship Attendance	_____	_____	_____	_____
8. Average Sunday School Attendance	_____	_____	_____	_____
9. Breakdown of current membership*				
Under 18	_____	_____	_____	_____ %
18-30	_____	_____	_____	_____ %
30-60	_____	_____	_____	_____ %
Over 60	_____	_____	_____	_____ %

*Family Units or single adults

(Note: If your organization has a breakdown in alternate age groupings, please use that grouping instead of the one listed above.)

10. Have you been over 30 days late on any financial obligation in the past 3 years?
If yes, please give details: _____

11. Are any members of your church going to receive loan proceeds? If yes, please
give details: _____

C. CHURCH BUILDING INFORMATION

1. What is the square footage of your facility(s)? _____

2. How many acres are currently occupied by your facility(s)? _____
(Include surrounding and supporting areas such as parking lot, etc...)

3. What date did you acquire your facility and at what cost? _____

4. Please list a description, the year completed and the construction costs of any
improvements to the church property in the past 5 years that are significant to
increasing the value of the property: _____

5. Has the property been appraised? _____ Yes _____ No
If yes,
Date: _____ Value \$ _____
Appraiser _____ Qualifications _____

6. Insurance Coverage: (Yes or No, Amount if yes) _____

7. Who holds title? _____

8. Legal Description _____

9. Liens? _____

10. 100 Year Flood Plain? _____

D. OTHER PROPERTY INFORMATION

1. How many unimproved acres do you own? _____

2. Does the Church own a parsonage? _____

3. What is the square footage of the parsonage? _____

4. How many acres are currently occupied by the parsonage? _____

5. What date did you acquire your parsonage and at what cost? _____

6. Does the Church own any other buildings? _____
7. How many acres are currently occupied by your other buildings? _____
8. What date did you acquire your other buildings and at what cost? _____
9. Please list a description, the year completed and the construction costs of any improvements to the other property(s) in the past 5 years that are significant to increasing their:
- _____
- _____
- _____
- _____
10. Has the property(s) been appraised? _____ Yes _____ No
 If yes,
 Date: _____ Value \$ _____
 Appraiser _____ Qualifications _____
11. Insurance Coverage: (Yes or No, Amount if yes) _____
12. Who holds title? _____
13. Legal Description _____
14. Liens? _____
15. 100 Year Flood Plane? _____

E. PROJECT INFORMATION

1. Please tell us why you need this loan _____
- _____
- _____
- _____
2. Are you/will you be involved in a special fund raising campaign for this project?
 _____ Yes _____ No
- a. If yes, what is/was the start date? _____
- b. If yes, what is the length of the campaign pledges? _____
- c. If yes, how much has been pledged to date? _____
- d. If yes, how much has been collected to date? _____
- e. If yes, number of pledging units? _____
- f. Did/will you use a professional fundraiser? _____
- g. If yes, which one? _____

3. What is your financial plan for servicing this loan? (i.e. Capital Campaign Funds, Other Reserves, Operating Budget) _____

F. LOAN INFORMATION

1. What is the amount of the loan request? \$ _____
2. Attach resolutions of congregational approval (i.e. Board of Trustees, Church Charge Conference, Admin. Council, Etc.)
3. Is Higher Authority necessary for this loan? (i.e. District Superintendent, District Building Committee) _____
4. How will the loan proceeds be used?

<u>Use</u>	<u>Amount Borrowed</u>	<u>Cost/Value</u>

TOTAL: \$ _____

G. LOAN APPLICATION DOCUMENTS

1. Balance Sheet & Income/Expense Statement previous 3 years
2. Balance Sheet & Income/Expense Statement current year to date
3. Copies of other Debt Documents (i.e. mortgages, lines of credit)

Prepared by: _____

Signature: _____

Date: _____

Pastor: _____

Signature: _____

Date: _____

Chair Board of Trustees: _____

Signature: _____

Date: _____