

# Whidbey Island Local Lending (WILL) Loan Request Submission Form

Thank you for submitting your loan request to Whidbey Island Local Lending (WILL). WILL creates opportunities for local individuals, businesses, and local lenders to network, build prosperous local businesses, and help build a more resilient and sustainable economy on Whidbey Island. We look forward to working with you. Please note that we only consider **local** loan opportunities, which are defined by our group as any individual or entity doing business on Whidbey Island.

Please complete this form and return it along with any related documents to the WILL Loan Opportunity Contact Person. Do not hesitate to contact them with any questions about WILL or the loan request submission process. If you would like to have a conversation via phone, you may request one via e-mail or mail.

WILL Loan Opportunity Contact Person E-mail: Steve Shapiro at [shapiro@whidbey.com](mailto:shapiro@whidbey.com)

## **Personal Contact Information**

Name of Owner/Borrower

Name of Co-Owner/Borrower

Mailing Address

City

State

Zip Code

Phone (Day)

Phone (Evening)

Cell Phone

Owner/Borrower Email

Co-Owner/Borrower Email

## **Business Contact Information** (If Applicable)

Business Name

UBI#:

Address

City

State

Zip Code

Phone

Email

## **Loan Opportunity Information**

**NOTE:** Questions in this section may be skipped if the information requested is contained in a separate Business Plan executive summary. Please do not include tax returns or other highly sensitive personal or confidential financial information.

Name of your Loan Opportunity (few words):

Brief description and history of your Business and/or Loan Opportunity:

Current financial situation of the business and/or borrower (Attach recent financial statements and projected income and expenses, if possible and not highly sensitive):

Total amount and duration preferred for loan (please include desired number of lenders and minimum amount per lender, if any):

Intended use of and reasons for funds sought:

Other loans or investment funds applied for:

**Advisors & References:**

Please list the professional advisor(s) you consulted with on this Loan Opportunity:

Advisor #1 Name and/or Business

Mailing Address

City State Zip Code

Phone

Email

Advisor #2 Name and/or Business

Mailing Address

City State Zip Code

Phone

Email

**Please list at least two local references**

Reference #1 Name and/or Business

Mailing Address

City State Zip Code

Phone

Email

Reference #2 Name and/or Business

Mailing Address

City State Zip Code

Phone

Email

### **Confidentiality**

To what extent is this Loan Opportunity known publicly?

Please describe any plans you have to offer this Loan Opportunity to others outside WILL.

### **Distribution**

Please specify to whom you wish to have your Loan Opportunity and related documents distributed by selecting one of the following three options:

To all WILL members

To all WILL members plus anyone else outside WILL whom any member feels might be interested

Only to the following WILL members:

### **WILL Referral & Relationships**

How did you hear about WILL? Name(s) WILL Member(s) you know:

## LEGAL DISCLAIMER

Whidbey Island Local Lending (WILL) offers no legal, lending, or financial advice, nor does WILL itself solicit, offer, or recommend any loan opportunities. WILL provides basic forms for the purpose of providing information about potential loan opportunities to eligible lenders, but WILL does not represent these forms to be anything more than general identifying information. The actual loan information, documentation, and any other legal and/or regulatory requirements for any particular loan shall be the sole responsibility of the individuals, businesses, or other organizations directly involved, and to any appropriate professionals deemed necessary to effect such transactions. Every state has distinct laws and regulations regarding securities offerings, so the individuals, businesses, or other organizations involved are responsible for ensuring they comply with these and any other applicable laws and regulations. WILL does not participate in any negotiations or solicitations for loan opportunities, nor does it participate in the loan transactions themselves. WILL exists solely to facilitate contacts between parties who provide local loan opportunities, and eligible parties who may be interested in participating.

The fact that WILL may facilitate submissions and/or distributions of information from individuals, businesses, and other organizations should not be construed as any sort of endorsement or approval of such submissions by WILL or its members. WILL does not examine or otherwise consider submissions beyond simply receiving them, checking them for basic identifying information, and forwarding them to the WILL members who have been designated by the submitting individuals and/or entities. WILL distributes loan opportunity submissions to its members according to instructions received from the submitting individuals and/or entities and is made without lender qualification of any kind by WILL itself. Any lender qualification is the sole responsibility of the submitting individuals and/or entities.

**WILL's activities are limited to arranging contact between member lenders and member-sponsored submitter/borrowers, and shall not constitute an offer to sell, or the solicitation of an offer to buy, securities or any other investment or financing opportunity, document, or vehicle.**

**In making a lending decision, lenders must rely on their own examination of the borrower, and the terms of the loan transaction or transaction documentation, including the merits and risks involved.**

**Prospective lenders should not construe WILL as providing legal, tax or financial advice. Each prospective lender should consult his or her own professional advisors as to the legal, tax, financial or other matters relevant to the suitability of any loan transaction or transaction documentation for such lender.**

### **Your Agreement:**

1. I hereby give Whidbey Island Local Lending (WILL) permission to circulate my business plan and/or loan opportunity documents among a) those WILL members whom I have designated, b) all WILL members, or c) all WILL members who may redistribute these documents to others outside WILL who may be interested;
2. I acknowledge that the confidentiality of submitted documents is not guaranteed, even if requested; and

3. I acknowledge, understand, and agree to the terms of the Legal Disclaimer (above). I hereby release WILL and its members from liability to the fullest extent of the law.

If I am/we are completing this form via computer, my/our typed name(s) below shall be considered to have the same legal effect as my/our written signature(s).

Owner/Borrower Signature

Owner/Borrower Printed Name

Co-Owner/Borrower Signature

Co-Owner/Borrower Printed Name

Date