

LOAN WORKSHEET

ZIEGLER INVESTMENT BANKING | COLLEGES & UNIVERSITIES

PLEASE COMPLETE THE INFORMATION BELOW AND FAX TO 414 978 6575, EMAIL IT TO BRIORDAN@ZIEGLER.COM OR MAIL IT TO THE ADDRESS LISTED BELOW FOR FINANCING STRUCTURE INFORMATION.

GENERAL INFORMATION

Name of Organization: _____ Contact: _____

Address: _____ City: _____ State: _____ ZIP Code: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

PURPOSE OF LOAN

Purchase property \$ _____

Refinance existing indebtedness \$ _____

New Construction or renovation \$ _____

Less amount of cash on hand \$(_____)*

* Please note the amount of cash on hand that you may want to go towards project costs.

Estimated total amount of financing needed \$ _____

STATISTICS

(These statistical categories fit most educational organizations. Please feel free to make changes that fit your organizational profile.)

YEAR	TOTAL ENROLLMENT
2017	
2018	
2019	
2020 (YTD)	

ADDITIONAL INFORMATION REQUESTED *(Please include the following information)*

- Last three years and current year-to-date financial statements and balance sheets
- Brief history of the school and educational philosophy
- List of Board of Directors/Trustees

ZIEGLER

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B.C. Ziegler and Company | Member SIPC & FINRA

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