

Business Account Manager	Telephone
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## Business Information

Company Name			Legal Name (under which tax returns are filed)		
Purpose of Loan					Amount Requested
Address			City		Postal Code
Business Phone	Business Fax	Business Number (BN)	Website	# Employees	Annual Sales
Primary Contact		Phone	Cell	Website	

## Industry Category

<input type="checkbox"/> Professional Services	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Wholesale	<input type="checkbox"/> Retail Services	<input type="checkbox"/> Tourism
<input type="checkbox"/> Other				

## Professional Advisors

Solicitor	Accountant	Insurance Broker
Primary Financial Institution	Financial Advisor	Referred by (if applicable)

## Documentation Requirements

In order to meet provincial and federal government requirements, we require the specified documentation prior to opening your account/membership and approving the loan.

### All types of Businesses must provide the following:

- Two pieces of identification (one with photo) for each signer
- Your credit history (we will obtain this for you)

### 1 Depending on your type of business you must provide additional documentation. Please identify your type of business.

<input type="checkbox"/> <b>Sole Ownership (Proprietorship)</b> <input type="checkbox"/> <b>Partnership</b>	<ul style="list-style-type: none"> <li>• Statement of Registration of General Partnership or Sole Proprietorship</li> <li>• Business Licence (if any)</li> </ul>
<input type="checkbox"/> <b>Unincorporated Association</b>	<ul style="list-style-type: none"> <li>• Constitution and Bylaws</li> <li>Note: At least two signing officers must be BlueShore Financial members</li> </ul>
<input type="checkbox"/> <b>Incorporated Company</b>	<ul style="list-style-type: none"> <li>• Articles of Incorporation – notarized copy (if originals available, BlueShore Financial will certify a copy in lieu of a notarized copy)</li> <li>• Trade name registration (if applicable)</li> <li>• Certificate of Registration (if out-of-province corporation)</li> <li>Note: Certified copies of the Certificate of Incorporation and Notices of Articles may be requested if an online search does not reflect the most up-to-date changes to the corporation's board of directors.</li> </ul>
<input type="checkbox"/> <b>Incorporated Society</b>	<ul style="list-style-type: none"> <li>• Certificate of Incorporation</li> <li>• Constitution and Bylaws – notarized copy (if originals available, BlueShore Financial will certify a copy in lieu of a notarized copy)</li> </ul>
<input type="checkbox"/> <b>Strata Corporation</b>	<ul style="list-style-type: none"> <li>• Copy of page 1 of strata plan registered at Land Title Office – notarized copy (if originals available, BlueShore Financial will certify a copy in lieu of a notarized copy)</li> <li>• Copy of strata AGM minutes indicating election of Officers (this is on the Welcome form)</li> </ul>

Continued on next page.

## 2 Credit applications:

- ☐ Completed Business Loan & Line of Credit Application
- ☐ Personal Net Worth Statement for each company principal
- ☐ Personal Credit Bureau Report with a minimum score of 650

## 3 You may also be asked to provide the following documentation:

- ☐ Corporate Credit Bureau Report
- ☐ Most recent three years of Personal Tax Returns
- ☐ Most recent three years of Business Tax Returns
- ☐ Most recent three years of Business Financial Statements

## Other Services

Help us get to know you better so we can provide you with other products and services that may be of benefit to you and/or your business. Please indicate any other services that are of interest.

Banking	Credit	Insurance	Investments
<input type="checkbox"/> Chequing / Savings <input type="checkbox"/> On-Line Banking <input type="checkbox"/> Payroll <input type="checkbox"/> Overdraft <input type="checkbox"/> ATM / Night Deposit <input type="checkbox"/> Foreign Transactions <input type="checkbox"/> Merchant Services	<input type="checkbox"/> Operating LOC <input type="checkbox"/> Equipment Leasing <input type="checkbox"/> Business MasterCard <input type="checkbox"/> Equipment Financing <input type="checkbox"/> Real Estate Financing	<input type="checkbox"/> Life <input type="checkbox"/> Disability <input type="checkbox"/> Critical Illness <input type="checkbox"/> Keyman <input type="checkbox"/> Group Benefit <input type="checkbox"/> Buy / Sell Agreement	<input type="checkbox"/> Business Investment Savings / Terms <input type="checkbox"/> Cash Management <input type="checkbox"/> Wealth Management <input type="checkbox"/> Group Management

## Authorization

Signer(s) certifies that he/she is authorized to execute this application for the business named above ("Applicant"), and that all information and documents submitted, including federal and provincial income tax returns (if any), are true, correct and complete. Signer(s) authorizes BlueShore Financial to obtain balance and payoff information on all accounts requiring payoff as a condition of approving this application. Signer(s) further authorizes the Credit Union to obtain consumer and/or business reports from and provide credit information to others, including other financial institutions and reporting agencies, in their business names and as individuals at any time, and agrees to notify the Credit Union promptly of any material change in any such information. Signer(s) acknowledges that (i) this application is subject to final credit approval of the applicant and its owners and: (ii) additional information may be required in order to make a final credit decision. If applicant is a legal entity, all owners must sign below and include titles.

Signature	Title	Date
Signature	Title	Date
Signature	Title	Date