

Religious Organization Information Sheet

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. Main Contact: _____

5. What is the legal structure (i.e. Corp. and type)? _____

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

7. Inception date of organization: _____

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

9. How many worship services are held? _____

10. Is there a formal tithing policy? _____

11. When are offerings collected? _____

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

13. Names of Clergymen:

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

14. Member of Denominational Body? Yes No

15. If yes, which one? _____

16. If yes, how is the body structured? _____

17. If yes, how much does your organization contribute directly to the denominational body annually? _____

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

<u>Officials</u>	<u>Title</u>	<u>Yrs. In office</u>	<u>Secular Emp.</u>

19. What committees/persons are in charge of other decisions? _____

B. FINANCIAL INFORMATION

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

YEAR:	2003	2004	2005	2006	2007
1. Operating Budget					
2. Actual Operating Income					
3. Membership Figures					
4. Giving Units (Family units or single adults)					
5. Average Worship Attendance					
6. Average Sunday School Attendance					
7. Breakdown of current Membership (If your organization has a breakdown in alternate age groups, please use your groups instead of those listed below)					
Under 18					
18-30					
30-60					
Over 60					
8. Average family income of membership					
9. Last date membership rolls purged					
10. Are you past due or have you been past due on any financial obligation during the last three years? If so, please detail:					

11. Are any members of your church going to receive any loan proceeds? If so, please detail:

C. PROPERTY INFORMATION

- 1. How many acres do you own? _____
- 2. What is the square footage of your facilities? _____
- 3. How many acres are currently occupied by your facilities? _____
- 4. What date did you acquire your facilities and at what cost? _____
- 5. Please list a description, the year completed and the construction costs of any improvements: _

- 6. Has the property been appraised? Yes No. If yes, Date: _____ Value \$ _____
 Appraiser: _____ Qualifications: _____
- 7. Insurance Coverage: Yes No, Amount if yes: _____
- 8. Who holds title? _____

D. PROJECT INFORMATION

- 1. Please provide a description of the current project: _____

- 2. Who is the architect? _____
- 3. What is the total cost of the project? _____
 Construction _____
 Soft Costs _____

Furniture/Fixtures _____
Contingency _____
Interest Carry _____
During Construction _____
Other _____

Total Estimated Cost: \$ _____

4. What is the estimated length of construction? _____
5. How much cash is available for the project? _____
6. 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? _____
 - c. If yes, how much is pledged to date? _____
 - d. If yes, any pledges over \$25,000? _____
 - e. If yes, any pledges over \$50,000? _____
 - f. If yes, any pledges over \$100,000? _____
 - g. Did you use a professional fundraiser? Yes No
 - h. If yes, which one? _____

E. LOAN INFORMATION

1. What is the amount of the loan request? _____
2. Is Board of Trustees action necessary for this loan (attach resolution)? Yes No
3. Is congregation's approval necessary for this loan (attach resolution)? Yes No
4. Is Higher Authority necessary for this loan? Yes No

F. ADDITIONAL INFORMATION NEEDED

1. Resume from Head Clergyman
2. Brief history of organization
3. Last Three years fiscal year end financial statement (income statements & balance sheet) – preferably CPA prepared.
4. Most recent interim financial statements (combined operating and restricted) with income statements and balance sheets.
5. Copy of your latest budget
6. If available, copy of architect's and contractor's contract (if applicable)
7. Operating budget projections for next three years.