



SECURITY FINANCIAL SERVICES
BUSINESS NOTE WORKSHEET

Please complete all fields and fax back to Security Financial Services at (415) 433-3588

Seller's Name _____ How did Note Seller hear of you? _____
Address _____
Phone (____) _____ Fax (____) _____

BUSINESS INFORMATION

Exact Name of Business _____
Type of Business: _____
Asset Value Breakdown: Equipment \$ _____ Inventory \$ _____ Goodwill \$ _____
Is operation a Franchise? Yes / No
Street Address _____ City _____ State _____ Zip _____
How long in business at this location? _____
Business Location is (check one) _____ Owned by Payor _____ Leased by Payor and expires _____
Terms of any lease renewal option(s): _____
Is Payor is a corporation? Yes / No Is the Note personally guaranteed? Yes / No

HISTORICAL INFORMATION

Date of Sale _____
Selling Price _____
Down Payment _____
1st Lien _____
2nd Lien _____

DESCRIPTION OF BUSINESS LOCATION & AREA

PAYOR INFORMATION

(Employment information, Payment Record, Payor SSN)

NOTE INFORMATION

Date of Note _____
Amount _____
Term of Months _____
Payment Amt _____
Balloon Amt _____
Balloon Date _____
Interest Rate _____
Due Date 1st Pmt _____
of Pmts Paid _____
of Pmts Left _____
Next Pmt Due _____
Balance _____

MOTIVATION FOR NOTE

(Why, How Much, When, etc.)

BROKER INFORMATION

Name _____
Company _____
Email _____
Phone _____
Fax _____
Comments _____

QUOTE TO SELLER (for SFS use only)

Buy Total Note _____
Buy _____ Pmts _____
Buy _____ Pmts _____
Date Quote Given _____
Closing Costs Pd by _____

*Please note: Upon Seller's acceptance of quote, we will fax a checklist of documents needed for our due diligence