



# Community Investment Corporation

## Request for Counseling and Loan Pre-Screening

**To be completed by each individual receiving business counseling/technical assistance from CIC**

1. Your Name (First, Middle, Last)		2. Telephone Number(s) Home _____		
3. Email Address		Cell _____		
4. Street Address (Residence)		City _____	State _____	Zip _____
5. Race (mark one or more): <input type="checkbox"/> African American (Non-Hispanic) <input type="checkbox"/> Asian <input type="checkbox"/> Hispanic		6. Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female		7. Within the last two years, have you ever received? <input type="checkbox"/> Aid to Families with Dependent Children (AFDC) <input type="checkbox"/> Temporary Assistance to Needy Families (TANF)
8. Do you consider yourself a person with a disability? <input type="checkbox"/> Yes <input type="checkbox"/> No		9. Veteran Status: <input type="checkbox"/> Veteran <input type="checkbox"/> Disabled Veteran <input type="checkbox"/> Non-Veteran		10. Military Status: <input type="checkbox"/> Military Reserve or National Guard <input type="checkbox"/> On Active Duty
11. How did you hear of us? <input type="checkbox"/> Word of Mouth <input type="checkbox"/> Television <input type="checkbox"/> SBA <input type="checkbox"/> SCORE <input type="checkbox"/> CT-SBDC <input type="checkbox"/> Internet		12. Are you currently in Business? <input type="checkbox"/> Yes <input type="checkbox"/> No (if no, skip to 21)		13. Month & Year Started: _____
15. Name of Company:		16. Type of Business:		
17. Do you conduct business online? <input type="checkbox"/> Yes <input type="checkbox"/> No		18. Is this a home based business? <input type="checkbox"/> Yes <input type="checkbox"/> No		
19. What is the legal entity of your business? <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> S-Corporation <input type="checkbox"/> LLC		20. Do you intend to apply to CIC for a business loan? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Undecided (If no or undecided, skip to end)		21. What is the nature of counseling you are seeking? <input type="checkbox"/> Start-up Assistance (How do I start a small business?) <input type="checkbox"/> Business Plan <input type="checkbox"/> Financing/Capital (such as applying for a loan, building equity capital) <input type="checkbox"/> Customer Relations <input type="checkbox"/> Business Accounting/Budget <input type="checkbox"/> Cash Flow Management <input type="checkbox"/> International Trade
<input type="checkbox"/> Partnership <input type="checkbox"/> LLP <input type="checkbox"/> Other _____		<input type="checkbox"/> Managing a Business/Managing Employees <input type="checkbox"/> Marketing/Sales (promotion, market research, pricing, etc.) <input type="checkbox"/> Government Contracting (including certifications) <input type="checkbox"/> Franchising <input type="checkbox"/> Buy/Sell Business <input type="checkbox"/> Technology/Computers <input type="checkbox"/> Legal Issues (such as, Should I incorporate?) <input type="checkbox"/> eCommerce (using the Internet to do business)		
22. Do you authorize CIC to obtain your credit history for purposes of pre-screening your loan request? <input type="checkbox"/> Yes <input type="checkbox"/> No  <i>If yes, provide social security number below (Each individual seeking Business Counseling/Technical Assistance must complete).</i>  SSN _____ - _____ - _____				
<p>The undersigned, individually and on behalf of the business, hereby requests business management counseling and technical assistance from the Community Investment Corporation ("CIC") in connection with CIC's loan programs. The undersigned acknowledges that CIC does not require the undersigned to follow advice given to the undersigned pursuant to this request and that following such advice is not a condition of obtaining a loan from CIC. Nothing in this paragraph, however, is intended to relieve the undersigned of the obligation to follow all conditions imposed by CIC in connection with any financing through CIC, including the terms and conditions of commitment letters and closing documents.</p> <p>In consideration of CIC furnishing management, counseling and/or technical or other assistance to the undersigned, the undersigned hereby waives any and all current and future claims or causes of action whatsoever against CIC, its directors, officers, employees, agents, contractors and volunteers, arising from any advice, service or other assistance provided to the undersigned, their employees and/or agents in connection with the undersigned's participation (pre-approval through loan payoff) in the CIC loan programs..</p> <p>Further, the undersigned authorizes CIC to release certain general business, demographic and other information to the SBA or other relevant funding source to evaluate CIC's assistance and loan services. In the event the undersigned becomes a CIC borrower, the undersigned authorizes CIC to use the business and the project financed in its advertising and promotions. Nothing in this paragraph, however, authorizes CIC to release personal or business financial information or other information generally deemed proprietary or confidential.</p>				
Signature:			Date:	