



## THRIVE ON SMALL BUSINESS LOANS: by the Greater Milwaukee Foundation's Impact Investing Program

All applicants must be operating a Socially and Economically-Disadvantaged Business (SEDI) as defined by the U.S. Treasury Department.

**Please complete the questions within this application and PFS in the text boxes provided. Please do not complete separately from the application.**

**When submitting your application, please send this file directly as a fillable PDF. Do not print, scan, or convert to an image.**

### APPLICANT:

Legal Name of Business:

Legal Name of Owner(s):

TIN/ EIN/ Social Security Number:

Business Address:  City:  State:  Zip:

Direct Phone:  Fax:  Email:

Website (if available):

Date Incorporated:  # of Full-Time Employees:  # of Part-Time Employees:

Is the business currently operating? Revenues

Revenues in 2024:  Revenues in 2025:

Loan Amount Requested:

Minority Owned or Controlled:

Women Owned or Controlled:

Which neighborhood is your business located?

Owner Ethnicity:

Operating Structure:

### LOAN REQUEST:

Purpose: How will you use this loan to grow or support your business? 500-word limit.

What does your business do and what products or services do you offer? 500-word limit.

How do you plan to repay this loan? (e.g., revenue, contracts) 500-word limit.

Market: Where does your business operate, and who are your primary customers? 500-word limit.

## ORGANIZATIONAL DESCRIPTION:

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<p>Background: When was your business founded and what is your history? 500-word limit.</p>	
<p>Experience: What relevant experience do you and your key staff bring to running this business? 500-word limit.</p>	
<p>What are your business goals and growth plans for the next 3 years? 500-word limit.</p>	

**USE OF FUNDS:**

Item(s) Description	Amount (from loan request)

**COLLATERAL:**

Please list assets available to use as collateral to secure this loan:

COLLATERAL	VALUE	COLLATERAL DETERMINED (Example: purchase price, current value, appraisal, etc.)

<p>Is this collateral used to secure any other loan? If yes, please identify other lien holders and describe the loan purpose.</p>	<div style="border: 1px solid black; height: 100px;"></div>
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## SUPPORTING INFORMATION:

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**Please enclose or upload the following documentation:**

*Note: It is not uncommon for Greater Milwaukee Foundation to request additional information specific to the loan requested.*

■ **ORGANIZATIONAL/BUSINESS DESCRIPTION:**

- ✓ *If available, brochures or marketing information regarding your business or business plan (not required)*

■ **ORGANIZATIONAL DOCUMENTS – Submit with your application a copy of:**

- ✓ Articles of Organization or Incorporation
- ✓ Operating Agreement **if applicable**
- ✓ Form SS-4 listing Employer Identification Number **if applicable**

■ **PERSONAL AND BUSINESS FINANCIAL INFORMATION:**

- ✓ Businesses with multiple owner(s) with a 20% or more interest in the company must each provide the following:
- ✓ Personal Tax Returns of owner(s) (2024 and 2025)
- ✓ Owner(s) Personal Financial Statement – included at end of this application. Husband and wife owners can complete one personal financial statement together.
- ✓ Copy of official Wisconsin Identification for each owner (Drivers Licenses etc.)

**Business Related**

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- ✓ If separate from personal taxes, provide Business Tax Returns (2024 and 2025)
- ✓ Company Prepared Profit & Loss Statement & Balance Sheet year to date as of 5/31/2026.

# CERTIFICATION OF LOAN APPLICATION AND CREDIT AUTHORIZATION

This Certification must be completed and returned with the supporting attachments.

By my signature below, I certify that the information contained herein and submitted in support of this loan request is complete and accurate.

By signing this application, permission is granted to Greater Milwaukee Foundation or its affiliates to talk with the applicant's creditors, lenders, and potential lenders regarding any information relevant in considering this loan.

I further understand that if this loan request is approved and disbursed, this organization will be listed as a recipient of loan funds from Greater Milwaukee Foundation and hereby agree to allow Greater Milwaukee Foundation to use our name, and images as part of its community marketing efforts.

By my signature below I authorize Greater Milwaukee Foundation, Inc. (directly or through a third-party affiliate) to obtain Consumer Credit Report on me and work with third party consultants in processing of this loan application.

This authorization is valid for purposes of verifying information given pursuant to a loan application, business negotiations, or any other lawful purpose covered under the Fair Credit Reporting Act (FCRA).

By my signature below, I hereby authorize all credit agencies to release all information they may have about me regarding credit history. This certification and authorization shall be valid in original or copy form.

Business Owner Name:

Social Security Number: \_\_\_-\_\_-  Date of Birth:

Current Street Address:  City:  State:

Business Owner Name #2:

Social Security Number: \_\_\_-\_\_-  Date of Birth:

Current Street Address:  City:  State:

Applicant Signature

Print Name and Title

Date