

# LOAN WORKSHEET

**PLEASE COMPLETE INFORMATION BELOW AND EMAIL TO [GERRI@SCHOOLDEVELOPERS.COM](mailto:GERRI@SCHOOLDEVELOPERS.COM), OR CALL 781-4SCHOOLS (781-472-4665)**

## GENERAL INFORMATION

Name of Organization: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Website: \_\_\_\_\_

Charter Authorizer (if applicable): \_\_\_\_\_

Next Charter Renewal Date (if applicable): \_\_\_\_\_

## PURPOSE OF LOAN

Purchase property \$ \_\_\_\_\_

New Construction or renovation \$ \_\_\_\_\_

Refinance existing indebtedness \$ \_\_\_\_\_

Estimated total amount of financing needed \$ \_\_\_\_\_

## VALUATION OF PROPERTY

Approximate value of existing property (if applicable) \$ \_\_\_\_\_

Approximate value of property to be acquired (if applicable) \$ \_\_\_\_\_

## STATISTICS

YEAR	TOTAL K-8 ENROLLMENT	TOTAL GRADE 9-12 ENROLLMENT
2019 – 2020		
2020 – 2021		
2021 – 2022		
2022 (YTD)		

## **ADDITIONAL INFORMATION REQUESTED:**

- Last three years and current year-to-date financial statements and balance sheets  
 Brief history of the school and educational philosophy