

Equipment Note Submission Worksheet

CCFC/Broker Information

Name _____ Date _____
 Company _____
 Address _____
 City _____ State _____ ZIP _____
 Phone _____ Fax _____

Equipment Information

Type of equipment (Description, year, make, model) _____
 Market value \$ _____ Basis of value _____
 Location address _____
 County _____ City _____ State _____
 Type of security instrument: Security agreement Lien on title Chattel mortgage
 Other (describe) _____
 If payor is a corporation, is there also a creditworthy individual liable for payments?
 No Yes (name) _____
 Describe equipment usage _____
 Describe any leasing activity _____

Historical Information

Date of sale _____
 Selling price \$ _____
 Down payment \$ _____
 First lien \$ _____
 Second lien \$ _____

Details of Original Sale

Note Information

Date of note _____
 Amount \$ _____
 Term in months _____
 Payment amount \$ _____
 Balloon amount \$ _____
 Balloon date _____
 Interest rate _____ %
 Due date 1st pmt _____
 # of pmts paid _____
 # of pmts left _____
 Next pmt due _____
 Balance \$ _____

Payor Information

(Employment info, payment history, SSN) _____

Seller's Motivation/Need

Quote

Buy Total Note \$ _____
 Buy _____ pmts for \$ _____
 Buy _____ pmts for \$ _____
 Date of quote _____
 Closing costs paid by _____

I have copies of the following:

Note Yes No
 Security instrument Yes No
 Title Yes No
 Sales contract Yes No
 Payor credit report Yes No
 Closing statement Yes No
 Bill of sale Yes No
 Insurance Yes No