

Equipment Note Submission Worksheet

CCFC/Referral Representative 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