BANK STATEMENT INCOME QUESTIONNAIRE

Borrower & Business Information		
Borrower Name		Business Name
1.	Percentage of ownership in the business:	NAICS Code (6 digits):
2.	Business Organizational Type (Select one): ❑ DBA ❑ Partnership ❑ LLC ❑ Corporation ❑ Sole Prop	
3.	What is the nature of your business, and how do you generate income? (Be specific)	
4.	How many employees/contractors do you pay?	What is your gross annual revenue?

Income Deposits		
5.	Deposit methods of income (check all that apply) ❑ Paypal / Zelle / Venmo ❑ Check ❑ Credit Card ❑ Cash ❑ Wire	Please list any bank statements owned by borrower to avoid sourcing transfers from other accounts: (e.g., BoA 1546889532) _____ _____ _____

Business Expenses

8. Do you incur these expenses for your business? If you mark "No," please explain why it does not apply:

Expense	Yes	No	Explanation if No
Advertising	❑	❑	
Space (Rent/Lease)	❑	❑	
Payroll (Other thank yourself)	❑	❑	
Insurance	❑	❑	
Cost of Goods Sold	❑	❑	
General (Sales/Admins/Travel)	❑	❑	

Required Deposit Sourcing:

At minimum, the three largest qualified gross deposits from each bank account must be sourced. Additionally:

- Cash and cash-app deposits may be sourced by invoice, or a borrower letter of explanation (must include time frame & means for saving).
- All deposits exceeding 100% of the average monthly qualified gross deposits must be sourced.
- Any deposit unusual in character or size, may require sourcing.

Signature _____ Date _____

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