



SHOPPING CENTER APPLICATION

Personal Information and Financial Statement

(Please Fill Out Completely)



Center Name: _____

Use: _____

Space # & Size _____

Full Name: _____ Age: _____

Driver's License #: _____

Address: _____ City: _____ State/Zip: _____

Phone: _____ Own or Rent: _____ How Long: _____ # of Dependents: _____

Present Employer: _____ How Long: _____

Address: _____

Phone: _____ Position: _____

Do you plan to leave this job within the next year? _____

Spouse's Full Name: _____ Age: _____

Driver's License #: _____

Present Employer: _____ How Long: _____

Address: _____

Phone: _____

Does your spouse plan to leave this job within the next year? _____

Bank & Address: _____ Acct #: _____

Bank & Address: _____ Acct #: _____

Have either you or your spouse ever filed bankruptcy (either personally or as any entity)? Yes No

BALANCE SHEET:

Cash and Savings: \$ _____

Stocks & Bonds (list on back): _____

Notes/Accounts Receivable: _____

Life Insurance (*not full value, only surrender value*): _____

Real Estate-total value (list on page 2): _____

Automobiles (List Make/Yr): _____

Personal Possessions: _____

Other: _____

Total Assets: \$ _____

Notes Payable-total \$ _____

owed (list on page 2): _____

Accounts Payable: total _____

owed (list on page 2): _____

Automobile-total owed _____

Income Taxes withheld to date: _____

Other: _____

Total Liabilities: _____

NET WORTH (assets minus liabilities): \$ _____



ANNUAL INCOME & EXPENSES:

Your Salary:	\$ _____	Rent/Home Loan Payments:	\$ _____
Spouse's Salary:	_____	Payments on Notes Owed:	_____
Rental Income:	_____	Payments on Accounts Payable:	_____
Dividend Income:	_____	Payments for Taxes:	_____
Interest Income:	_____	Personal Living Expenses:	_____
Other:	_____	Other:	_____
Total Annual Income:		Total Annual Expenses:	

STOCKS & BONDS:

Description	Number of Shares	Original Cost	Present Value
TOTALS			

REAL ESTATE MORTGAGES AND TRUST DEEDS:

Description	Original Cost	Present Value	Amount Owed	Monthly Payment
TOTALS				

NOTES & ACCOUNTS PAYABLE (DO NOT INCLUDE REAL ESTATE):

Description	Account Number	Amount Owed	Present Value
TOTALS			

The information contained in this Personal Information and Financial Statement is certified as true and accurate as of the date executed and the date delivered by the undersigned and you are authorized to conduct a credit and background check. It is understood that you intend to materially rely on this information if you enter into any lease, guarantee of lease, transfer of lease, or other agreement with this undersigned. Any attachment or additional pages are a part hereof.

Date:	
Signature:	Social Security:
Spouse's Signature:	Social Security:



REGARDING YOUR PLANNED BUSINESS: Please complete the following and attach additional information regarding you related background and business plans as necessary.

What are your planned hours of operation for the business?			How many employees do you anticipate?	
Monday		to:	Total:	At any one time:
Tuesday		to:		
Wednesday		to:	Who will manage the business on a day-to-day basis?	
Thursday		to:		
Friday		to:		
Saturday		to:		
Sunday		to:		

What background do you have in this business? (Please attach a resume)

How do you plan to generate business?

How much do you estimate you will spend fixturizing the premises? \$ _____

How much do you estimate you will spend on inventory? \$ _____

How do you plan to finance these costs (savings, loans, etc.)?

What level of annual gross receipts do you feel you need?	Year 1	Year 2
To stay in business:	\$ _____	_____
To be satisfied in business:	\$ _____	_____
To be extremely pleased with the business:	\$ _____	_____

What are your income projections for the first two years?	Year 1	Year 2
Gross Receipts:	\$ _____	\$ _____
Less: Returns	_____	_____
Credit Losses	_____	_____
Theft/Pilferage	_____	_____
Other	_____	_____
Net Receipts:	\$ _____	\$ _____
Less: Cost of goods sold	_____	_____
Less: Operating expenses	_____	_____
Salaries excluding self & spouse	_____	_____
Debt service	_____	_____
Rent and related	_____	_____
Advertising & promotion	_____	_____
Insurance	_____	_____
Other	_____	_____
Net income excluding owner's salaries:	\$ _____	\$ _____



BANK VERIFICATION

Please take this form to your branch bank officer and have the bottom portion completed.

Date: _____

TO (Name of Bank):

This is your written authorization to provide verification of my accounts listed below.

(Signature of Account Holder)

(Print Name)

THIS PORTION IS TO BE COMPLETED BY THE BANK

Account	Type of Account	Amount	Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Date: _____

(Authorized Bank Signature)

(Print Name)

(Title)

Please Mail to: NewMark Merrill Companies, 5850 Canoga Avenue, Suite 650, Woodland Hills, CA 91367
Attn: Denisha Bendz
Or Fax to: 818-710-6116 upon completion.



Please include the following information with this application

- 1. Current Corporation Balance Sheet and Income Statement (*if applicable*).**
- 2. Statement from Landlord verifying your current lease status (*if applicable*).**
- 3. Your last two year's personal tax returns.**
- 4. Your last two months bank statements**
- 5. Please enclose a photocopy of your most recent proof of personal identification and submit with this application. (i.e., California driver's license, passport photo, California I.D., etc.)**
- 6. Business plan (see below).**

BUSINESS PLAN INFORMATION

Please include the following information in a concise and brief format.

MANAGEMENT	MERCHANDISING	FINANCIAL
<ul style="list-style-type: none">• Method of store operation	<ul style="list-style-type: none">• Merchandise store will carry	<ul style="list-style-type: none">• When will you achieve break-even point?
<ul style="list-style-type: none">• Store manager(s)	<ul style="list-style-type: none">• Mix of products	<ul style="list-style-type: none">• Expected sales levels ending each year of the term
<ul style="list-style-type: none">• Number of the other locations also being managed	<ul style="list-style-type: none">• Pictures, photos, or sample of merchandise to be sold	
<ul style="list-style-type: none">• Hours of store operation	<ul style="list-style-type: none">• Promotion and marketing to be utilized	
<ul style="list-style-type: none">• Numbers of employees		