

INCOME STATEMENT AND QUESTIONNAIRE
FOR SELF-EMPLOYED



QUESTIONNAIRE

1. How long have you been engaged in this type of business? _____

2. How was the start up of the business funded, specify the source of funding? _____

3. Specify details of financial institution where the main business account is held:

Name: _____

Address: _____

4. State the average amount spent by each customer:

- Below \$1,000
- \$1,000-\$ 5,000
- \$5,000-\$ 10,000
- Above \$10,000

5. State the number of customers served by the business on a weekly basis:

- Below 20 customers weekly
- 20 - 50 customers weekly
- If above 50, give approximate number

6. How much do you expect to lodge:

Gross Weekly \$..... or Gross Monthly \$.....

7. Please provide additional information on the business:

I confirm that the information provided herein to the Society is accurate to the best of my knowledge.

.....
SIGNATURE OF APPLICANT

.....
DATE:

.....
SIGNATURE OF CSR

.....
DATE:

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The client is required to provide documentation from the sections below, based on the business registration status.

If the business is registered, the customer is required to provide the document listed in **Section A**.

If the business is unregistered, then the customer is required to provide any two (2) of the documents listed at **Section B**.

Section A – Registered Business

- Copy of Business Name Registration Certificate

Section B – Unregistered Business (Provide any 2)

- In-house financial statements for last three months
- Reference letter from Bank
- Copy of bank statement or passbook
- Purchase order from two main customers (issued within two months of the date of application)
- Receipt for supplies purchased for the business
- Import licence
- Invoices for goods or services sold within the last three months
- Written Customer Testimonial from two main customers
- Copy of any government issued permit or licence. (e.g., Food handlers permit, vending permit, taxi permit, etc.)
- Proof of membership in trade or professional association (e.g., letter from President, Treasurer or Secretary)

FOR OFFICE USE ONLY:

BRANCH RECEIVED: _____

DATE: _____