

# INCOME STATEMENT AND QUESTIONNAIRE FOR SELF-EMPLOYED



Customer Name:		
Business Name (if operating under a Business Name):		
Nature of Business:		
Business Address:		
Business T.R.N: (where applicable)		
Business Phone Number: 1 2		
(Area code) (Area code)		1)
ESTIMATED NET INCOME (Monthly):	AMOUNT (J\$	6)
1. Income from business		
2. Other Income (loan, partner, maintenance payments)		
TOTAL INCOME (Add items 1 and 2)		
EXPENSES (Monthly)		
3. Telephone		
4. Electricity		
5. Water		
6. Insurance		
home,		
motor car,		
life		
Other:		
7. Cable		
8. Rent		
9. Taxes		
10. Loan payments		
☐ Mortgage		
Other:		
11. Stationery/Office Supplies (where applicable)		
12. Wages		
13. Other Expenses (describe)		
TOTAL EXPENSES (Add Items 3 to 13)		
DISPOSABLE INCOME (TOTAL INCOME LESS TOTAL EXPENSES)		

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QUESTIONAIRE		
1. How long have you been engaged in this type of business? _		
2. How was the start up of the business funded, specify the sour	rce of funding?	
3. Specify details of financial institution where the main busines  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 we	eekly 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 Mon	thly \$	
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:	
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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 <b>Section A</b> .
If the business is unregistered, then the customer is required to provide any two (2) of the documents listed at <b>Section B</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: