

# Equipment Note Worksheet

## SUBMISSION INFORMATION:

Name of Submitter: \_\_\_\_\_ Email: \_\_\_\_\_  
Telephone Number for us to call: \_\_\_\_\_ Select your Position: \_\_\_\_\_

Name of Note Holder: \_\_\_\_\_  
Street address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Fax: \_\_\_\_\_ Pager/Cell: \_\_\_\_\_  
Note Holder's Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

## Equipment Information

Type of Equipment (Description, Year, Make, Model):

Market Value: \$ \_\_\_\_\_ Basis of Value: \_\_\_\_\_  
Equipment Location Address: \_\_\_\_\_ County: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Describe equipment usage:

Describe any leasing activity:

If Payor is a corporation, is there also a creditworthy individual for payments? ( ) Yes ( ) No  
If yes, Name: \_\_\_\_\_

## Payor Information:

Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_  
Credit Rating: \_\_\_\_\_

## Historical Information

Type of Security Instrument: \_\_\_ Security Agreement \_\_\_ Lien on Title \_\_\_ Chattel Mortgage \_\_\_ Other:  
(Brief Description):

Lien Position: \_\_\_ 1<sup>st</sup> \_\_\_ 2<sup>nd</sup> \_\_\_ 3<sup>rd</sup>

Date of sale	_____	First lien	\$ _____
Selling price	\$ _____	Second lien	\$ _____
Down payment	\$ _____		

## Note Information

Date of note	_____	How much money are you seeking? \$ _____
Amount	\$ _____	
Term in months	_____	When do you want the money? _____
Payment amount	\$ _____	
Balloon amount	\$ _____	Will there be any payoffs at closing? ___ Yes ___ No
Balloon date	_____	
Interest rate	_____ %	If so, what are the amounts? \$ _____
Due date 1st pmt	_____	\$ _____
# of pmts paid	_____	\$ _____
#of pmts left	_____	
Next pmt due	_____	
Balance	\$ _____	

Why is the note being sold?