

Bank Statement Income Questionnaire

To accurately assess your income using bank statements, you must complete the following questionnaire to the best of your knowledge.

Name _____ Business Name: _____

1. Percentage of ownership in the business: _____
2. Business Organizational Type (check one below)
 - DBA
 - Partnership
 - LLC
 - Corporation
3. Please describe the nature of your business, and how you generate income (please be specific):

4. Number of employees/contractors you pay: _____

5. Gross Annual Revenue: _____

6. Deposit methods of income (check all that apply)
 - PayPal / Zelle / Venmo
 - Check
 - Credit Card
 - Cash
 - Wire

7. Do you incur this expense for your business? If you mark "NO", please explain why it does not apply.

	YES	NO	
a. Advertising	<input type="checkbox"/>	<input type="checkbox"/>	_____
b. Space (Rent/Lease)	<input type="checkbox"/>	<input type="checkbox"/>	_____
c. Payroll (wages paid other than to applicant)	<input type="checkbox"/>	<input type="checkbox"/>	_____
d. Insurance	<input type="checkbox"/>	<input type="checkbox"/>	_____
e. Cost of Goods Sold	<input type="checkbox"/>	<input type="checkbox"/>	_____
f. General (Travel / Sales / Admin)	<input type="checkbox"/>	<input type="checkbox"/>	_____

 Signature
 V2_04302024

 Date