

INITIAL FINANCING WORKSHEET DATA

RELIGION FINANCE PRACTICE



PLEASE COMPLETE THE INFORMATION REQUESTED BELOW AND EMAIL THIS WORKSHEET
AND ANY OTHER RELATED DATA TO [DSCHLOSSER@STIFEL.COM](mailto:dschlosser@stifel.com) OR [BDODSON@STIFEL.COM](mailto:bdodson@stifel.com)

GENERAL INFORMATION

Name of Organization: _____ Contact: _____
Address: _____ City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
Email: _____ Website: _____
Affiliation: _____

ANTICIPATED PURPOSE OF PROCEEDS

- ☐ Purchase Property \$ _____ ☐ New Construction or Renovation \$ _____
☐ Refinance existing indebtedness \$ _____ ☐ Less amount of cash on hand \$(_____)*

*Please note the amount of cash on hand that you may want to go toward projects costs.

Estimated total amount of financing needed \$ _____

VALUATION OF PROPERTY

Approximate value of existing property \$ _____
Approximate value of property to be acquired (If applicable) \$ _____

STATISTICS

(These statistical categories fit most organizations. Please feel free to forward anything that fits your organizational profile.)

YEAR	TOTAL MEMBERSHIP	AVERAGE WEEKLY IN-PERSON WORSHIP ATTENDANCE	AVERAGE WEEKLY ONLINE WORSHIP ATTENDANCE
2022			
2023			
2024			
2025 (YTD)			

ADDITIONAL INFORMATION REQUESTED *(Please include the following information)*

- ☐ Last three years and current year-to-date financial statements and balance sheets
☐ Brief history of the organization
☐ List of Board of Directors/Trustees/Tenure
☐ Copy of Bylaws

CONTACT US

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