

**PROSPECTIVE TENANT FACT SHEET**

Please complete all sections and sign the final page.

--FOR OFFICE USE ONLY--

Project _____	Date Rec'd _____	Time Rec'd _____
Leasing Agent _____	How did prospect find property? _____	
Other _____	APPROVED _____	

***BUSINESS INFORMATION***

Full Legal Company Name _____	Business License # _____
DBA _____	City _____
Date Fictitious Business Name Filed _____	Fed. Employer ID # _____
Business Address _____	
Telephone # _____	Person to contact _____
Years in business _____	Years in this location _____
Number of stores _____	Where _____
Nature of business _____	
Lease under: <input type="radio"/> Corporation - State of Incorporation _____ Agent for Service _____	
<input type="radio"/> Partnership - <input type="radio"/> General <input type="radio"/> Limited	
<input type="radio"/> Individual(s) - Name(s) _____	

***BANK ACCOUNTS - List all business and personal accounts.***

Name of Bank _____	Branch _____	Phone # _____
Account Name _____	Account # _____	Type: (Check One) <input type="radio"/> Personal <input type="radio"/> Business
Name of Bank _____	Branch _____	Phone # _____
Account Name _____	Account # _____	Type: (Check One) <input type="radio"/> Personal <input type="radio"/> Business
Name of Bank _____	Branch _____	Phone # _____
Account Name _____	Account # _____	Type: (Check One) <input type="radio"/> Personal <input type="radio"/> Business

***BUSINESS TRADE REFERENCES - If none, list personal references.***

Landlord's Name _____	Phone # _____
Address _____	How long as tenant? _____
Insurance Agency _____	Phone # _____
Address _____	Agent _____
Comments _____	Type: <input type="checkbox"/> Personal <input type="checkbox"/> Business <input type="checkbox"/> Auto
Name of Company _____	Phone # _____
Address _____	Agent _____
Comments _____	Type: <input type="checkbox"/> Personal <input type="checkbox"/> Business
Name of Company _____	Phone # _____
Address _____	Agent _____
Comments _____	Type: <input type="checkbox"/> Personal <input type="checkbox"/> Business

***BANKRUPTCY***

Have you ever filed for bankruptcy?			
Business: <input type="radio"/> No <input type="radio"/> Yes - When _____	State _____	Chapter _____	
Personal: <input type="radio"/> No <input type="radio"/> Yes - When _____	State _____	Chapter _____	
Details _____			
_____			

**PERSONAL INFORMATION**

First Name \_\_\_\_\_ Middle \_\_\_\_\_ Last Name \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Office Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
 Other \_\_\_\_\_ Email \_\_\_\_\_  
 Home Address \_\_\_\_\_  
 Previous Address (if less than 2 yrs. at current) \_\_\_\_\_  
 Date of Birth (or age) \_\_\_\_\_ Social Security # \_\_\_\_\_ Driver's Lic. # \_\_\_\_\_  
 Employer \_\_\_\_\_ Phone # \_\_\_\_\_  
 Employer's Address \_\_\_\_\_  
 Occupation \_\_\_\_\_ Monthly Income \$ \_\_\_\_\_

**SPOUSE'S INFORMATION**

First Name \_\_\_\_\_ Middle \_\_\_\_\_ Last Name \_\_\_\_\_  
 Home Address \_\_\_\_\_  
 Previous Address (if less than 2 yrs. at current) \_\_\_\_\_  
 Date of Birth (or age) \_\_\_\_\_ Social Security # \_\_\_\_\_ Driver's Lic. # \_\_\_\_\_  
 Employer \_\_\_\_\_ Phone # \_\_\_\_\_  
 Employer's Address \_\_\_\_\_  
 Occupation \_\_\_\_\_ Monthly Income \$ \_\_\_\_\_

**MORTGAGES**

**PERSONAL:** Mortgage Holder \_\_\_\_\_ Account # \_\_\_\_\_  
 Contact Person \_\_\_\_\_ Telephone # \_\_\_\_\_  
 Address \_\_\_\_\_  
**BUSINESS:** Mortgage Holder \_\_\_\_\_ Account # \_\_\_\_\_  
 Contact Person \_\_\_\_\_ Telephone # \_\_\_\_\_  
 Address \_\_\_\_\_

**INDIVIDUAL FINANCIAL STATEMENT**

Financial condition as of: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Name(s) \_\_\_\_\_ Telephone # \_\_\_\_\_  
 Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

ASSETS		LIABILITIES	
Cash in the Bank		Notes Payable, Bank	
Cash in Savings & Loans		Notes Payable, Others (Sch. E)	
Notes Receivable (Sch. A)		Accounts Payable (Sch. E)	
Accounts Receivable (Sch. A)		Installment Contracts (Sch. E)	
Inventory (Detail)		Income Tax Payable	
Securities: Listed (Sch. B)		Other Current Liabilities	
Securities: Unlisted (Sch. B)		<b>Total Current Liabilities</b>	
<b>Total Current Resources</b>		Loans payable after one (1) year	
Trust Deeds Receivable (Sch. C)		Trust Deeds, Payable (Sch. D)	
Real Estate (Sch. D)		Mortgages	
Automobile (Yr, Make, & Model)		Loan on Life Insurance	
Automobile (Yr, Make, & Model)		Lease Payments (after one (1) year)	
Other assets (detail)			
<b>TOTAL ASSETS</b>	<b>\$</b>	<b>TOTAL LIABILITIES</b>	<b>\$</b>

**TOTAL NET WORTH (Total Assets - Total Liabilities)** **\$**

Schedule A. NOTES AND ACCOUNTS RECEIVABLE				
Name of Payer(s)	Amount	Monthly Payment	Final Payment Due	Collateral
<b>TOTALS</b>	<b>\$</b>	<b>\$</b>		

Schedule B. SECURITIES AND BONDS (Use supplemental schedule, if necessary)					
Description (Listed)	Issued in Name of	Joint Tenancy	Shares or Bonds	Per Share	Market Value
<b>Total Listed</b>					

Description (Unlisted)	Issued in Name of	Joint Tenancy	Shares or Bonds	Per Share
<b>Total Unlisted</b>				

Schedule C. TRUST DEEDS RECEIVABLE					
Name of Payer(s)	Legal / Street Address	Unpaid Balance	Value of Property	1 <sup>st</sup> /2 <sup>nd</sup> Lien	Terms
<b>Totals</b>		<b>\$</b>	<b>\$</b>		

Schedule D. REAL ESTATE OWNED (Designate: "I" - Improved, "U" - Unimproved)									
Location/Description	I / U	Title Vesting	Cost	Present Value	Annual Income	Annual Expense	Trust Deeds		
							Balance	Payment	Held By
<b>Totals</b>			<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>			

Schedule E. NOTES, ACCOUNTS, AND CONTRACTS PAYABLE				
To Whom Payable	Amount	Monthly Payment	Final Payment Due	Collateral
<b>Totals</b>	<b>\$</b>	<b>\$</b>		

- 1.) Is any of the real estate in Schedule C subject to a Declaration of Homestead?  No  Yes (details below)  
 \_\_\_\_\_  
 \_\_\_\_\_
  
- 2.) Are any of your personal assets pledged?  No  Yes (details below)  
 \_\_\_\_\_  
 \_\_\_\_\_
  
- 3.) Are there any suits, judgments, executions or attachment filed against you?  No  Yes (details below)  
 \_\_\_\_\_  
 \_\_\_\_\_
  
- 4.) Have you ever failed in business or compromised debts with your creditors?  No  Yes (details below)  
 \_\_\_\_\_  
 \_\_\_\_\_

Refer to Federal Income Tax Returns for previous years for the following information.

Tax Return Year Used:

ANNUAL INCOME		ANNUAL EXPENDITURES	
Salary or wages		Property taxes & assessments	
Dividends and interest		Federal & state income tax	
Rentals (gross)		Mortgage/rent payments	
Business or professional (net)		Note or contract payments	
Other income (detail below)		Insurance premiums	
		Estimated living expenses	
<b>TOTAL INCOME</b>	<b>\$</b>	<b>TOTAL EXPENDITURES</b>	<b>\$</b>

The signatures below authorize Lewis Management Corp. and its affiliates to use the information contained herein as needed to obtain credit information respecting the prospective tenant and any prospective guarantors.

I (we) certify that the foregoing information is true and accurate to the best of my (our) knowledge.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*