

**Investment Funding Application**

**Applicant's Full Legal Name** \_\_\_\_\_

(First, Middle, Last Name)

**Spouse/Co-Applicants Full Legal Name** \_\_\_\_\_

(First, Middle, Last Name)

Name	Soc #	Birth Date
_____ self _____	_____	_____
_____ spouse _____	_____	_____
_____ partner _____	_____	_____
_____ spouse _____	_____	_____

**Primary Applicant's Information:**

Present Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please Check One: Own \_\_\_\_\_ Rent \_\_\_\_\_ How Long? \_\_\_\_\_

Cell # \_\_\_\_\_ Home # \_\_\_\_\_ Office # \_\_\_\_\_

E-mail \_\_\_\_\_

How long at current Address \_\_\_\_\_ year(s) \_\_\_\_\_ months

Previous Address \_\_\_\_\_

Marital Status: Married \_\_\_\_\_ or Engaged \_\_\_\_\_ or Divorced \_\_\_\_\_ or Single \_\_\_\_\_

If Married, for how long? \_\_\_\_\_ If Divorced, what year? \_\_\_\_\_

List all companies (LLC, DBA, Corps, etc.) \_\_\_\_\_  
that you have done business as in the last 5 yrs. \_\_\_\_\_

List all partners and individuals you have  
done business within the last 5 yrs. \_\_\_\_\_

List all the lenders you have borrowed from for  
investment purposes within the last 10 yrs. \_\_\_\_\_

Applicant's Estimated Credit Score \_\_\_\_\_ Co-Applicant's Estimated Credit Score \_\_\_\_\_

Primary Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_ Co-Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_

*This Space Is For Internal Use Only By Autumnwood Funding*

Date Application Was Received: \_\_\_\_\_

Application Received By: \_\_\_\_\_

Application Received Via: Email Mail Fax In Person

**Continued- Primary Applicant's Information:**

Applicant's Present Employer \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Applicant's Employer's Phone # \_\_\_\_\_

How Long Has Applicant Been at Current Job? \_\_\_\_\_ year(s) \_\_\_\_\_ months

Position \_\_\_\_\_ Annual Salary \$ \_\_\_\_\_

Applicant's Previous Employer \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Applicant's Previous Employer's Phone # \_\_\_\_\_

How Long Was Applicant at Previous Employer? \_\_\_\_\_ year(s) \_\_\_\_\_ months

**Applicant's Additional Annual Income** \$ \_\_\_\_\_ Please describe in detail below:

\_\_\_\_\_  
\_\_\_\_\_

**Applicant's Motor Vehicles**

Make & Model \_\_\_\_\_ Year \_\_\_\_\_ Payment: \_\_\_\_\_

Make & Model \_\_\_\_\_ Year \_\_\_\_\_ Payment: \_\_\_\_\_

Make & Model \_\_\_\_\_ Year \_\_\_\_\_ Payment: \_\_\_\_\_

Has Applicant Ever Filed Bankruptcy? Yes \_\_\_\_\_ No \_\_\_\_\_ Month/Yr \_\_\_\_\_

Discharge Date (month & year) \_\_\_\_\_ Chapter 7 , 11 or 13? \_\_\_\_\_

Has Applicant Ever Had A Foreclosure? Yes \_\_\_\_\_ No \_\_\_\_\_ Month/Yr \_\_\_\_\_

Please explain any past judgement rendered against applicant for an amount greater than \$2,000:  
\_\_\_\_\_  
\_\_\_\_\_

**Name and Relation of Nearest Relative** (Not Living with Applicant) \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Cell # \_\_\_\_\_ Home # \_\_\_\_\_

Primary Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_ Co-Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_

**Applicant Banking Information - Checking/Savings Accounts**

1 Name of Bank \_\_\_\_\_ Account # \_\_\_\_\_ Balance \$ \_\_\_\_\_

2 Name of Bank \_\_\_\_\_ Account# \_\_\_\_\_ Balance \$ \_\_\_\_\_

3 Name of Bank \_\_\_\_\_ Account # \_\_\_\_\_ Balance \$ \_\_\_\_\_

4 Name of Bank \_\_\_\_\_ Account# \_\_\_\_\_ Balance \$ \_\_\_\_\_

5 Name of Bank \_\_\_\_\_ Account # \_\_\_\_\_ Balance \$ \_\_\_\_\_

6 Name of Bank \_\_\_\_\_ Account# \_\_\_\_\_ Balance \$ \_\_\_\_\_

**PLEASE ATTACH 3 MONTHS OF SUPPORTING BANK STATEMENTS FOR EACH ACCOUNT**

**Spouse/Co-Applicant's Information (required if applicable):**

Co-Applicant's Name \_\_\_\_\_

Co-Applicant's Present Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Cell # \_\_\_\_\_ Home # \_\_\_\_\_ Office # \_\_\_\_\_

E-mail: \_\_\_\_\_

Please Check One: Own \_\_\_\_\_ Rent \_\_\_\_\_ How Long? \_\_\_\_\_

Co-Applicant's Previous Address \_\_\_\_\_

Co-Applicant's Marital Status: Married \_\_\_\_\_ or Engaged \_\_\_\_\_ or Divorced \_\_\_\_\_ or Single \_\_\_\_\_

If Married, for how long? \_\_\_\_\_ If Divorced, what year? \_\_\_\_\_

List all companies (LLC, DBA, Corps, etc.) \_\_\_\_\_  
that you have done business as in the last 5 yrs. \_\_\_\_\_

List all partners and individuals you have \_\_\_\_\_  
done business within the last 5 yrs. \_\_\_\_\_

List all the lenders you have borrowed from for \_\_\_\_\_  
investment purposes within the last 10 yrs. \_\_\_\_\_

Co-Applicant's Present Employer \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Co-Applicant's Employer Phone # \_\_\_\_\_

How Long Has Co-Applicant Been at Current Job? \_\_\_\_\_ year(s) \_\_\_\_\_ months

Position \_\_\_\_\_ Annual Salary \$ \_\_\_\_\_

Primary Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_ Co-Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant's Previous Employer \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Co-Applicant's Previous Employer's Phone # \_\_\_\_\_

How Long Was Co-Applicant at Previous Employer? \_\_\_\_\_ year(s) \_\_\_\_\_ months

**Co-Applicant's Additional Annual Income** \$ \_\_\_\_\_ Please describe in detail below:

\_\_\_\_\_  
\_\_\_\_\_

**Co-Applicant's Motor Vehicles**

Make & Model \_\_\_\_\_ Year \_\_\_\_\_ Payment: \_\_\_\_\_

Make & Model \_\_\_\_\_ Year \_\_\_\_\_ Payment: \_\_\_\_\_

Make & Model \_\_\_\_\_ Year \_\_\_\_\_ Payment: \_\_\_\_\_

Has Co-Applicant Ever Filed Bankruptcy?

Yes \_\_\_\_\_ No \_\_\_\_\_ Month/Yr \_\_\_\_\_

Discharge Date (month & year) \_\_\_\_\_

Chapter 7 , 11 or 13? \_\_\_\_\_

Has Co-Applicant Ever Had A Foreclosure?

Yes \_\_\_\_\_ No \_\_\_\_\_ Month/Yr \_\_\_\_\_

Please explain any past judgement rendered against co-applicant for an amount greater than \$2,000:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Name of Nearest Relative**  
(Not Living with Co-Applicant)

**Address**

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Cell # \_\_\_\_\_ Home # \_\_\_\_\_

**Co-Applicant's Banking Information - Checking/Savings Accounts**

1 Name of Bank \_\_\_\_\_ Account # \_\_\_\_\_ Balance \$ \_\_\_\_\_

2 Name of Bank \_\_\_\_\_ Account# \_\_\_\_\_ Balance \$ \_\_\_\_\_

3 Name of Bank \_\_\_\_\_ Account # \_\_\_\_\_ Balance \$ \_\_\_\_\_

4 Name of Bank \_\_\_\_\_ Account# \_\_\_\_\_ Balance \$ \_\_\_\_\_

5 Name of Bank \_\_\_\_\_ Account # \_\_\_\_\_ Balance \$ \_\_\_\_\_

6 Name of Bank \_\_\_\_\_ Account# \_\_\_\_\_ Balance \$ \_\_\_\_\_

Primary Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_ Co-Applicant Initial Here: \_\_\_\_\_ Date: \_\_\_\_\_

**For All Applicants:**

Real Estate Investor Organizations in which you belong: \_\_\_\_\_

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How many rehab projects are you currently working on that have not been SOLD or RENTED? \_\_\_\_\_

I/WE, AUTHORIZE MR. KNOPPE AND ANY COMPANY OR PERSON HE MAY CONTACT TO SUPPLY ANY AND ALL INFORMATION NECESSARY REGARDING OUR BANKING ACTIVITY, CREDIT HISTORY, POLICE AND CRIMINAL RECORDS, AND EMPLOYMENT HISTORY. I/WE, UNDERSTAND THAT MISREPRESENTATION OR CONCEALMENT RELATIVE TO ANY OF THE ABOVE FACTS WILL, AT MR. KNOPPE'S OPTION, VOID MY/OUR RIGHTS UNDER THE AGREEMENT(S) WITH KNOPPE. IF ANY INFORMATION PROVIDED BY YOU IS FOUND TO BE FALSE AND INACCURATE, YOUR APPLICATION MAY BE IMMEDIATELY DENIED AND ALL FUNDS FORFEITED. CREDIT RECORDS MAY BE OBTAINED NOW AND IN THE FUTURE FOR AS LONG AS MONEY IS OWED ON AN ACCOUNT.

**Please Attach the Following Documents with the Application:**

1. Consolidated Personal Financial Statement (You can provide your own or use the included template)
2. Property List (You can provide your own or use the included template)
3. Four Months Bank Statements for Business and Personal Accounts (Checking, Savings, Money Market, etc.)
4. Copies of Articles of Incorporation for all companies owned by applicants.

**You may submit the completed application one of three ways:**

1. Save the Completed PDF Application form to your computer and email to Chris@FundingByAW.com
2. Save and Print the Completed Application form and mail to: Autumnwood Funding - 634 Bear Run Lane, Lewis Center, OH 43035
3. Save and Print the Completed Application form and fax to 614-433-9190

*Type or sign your name(s) below:*

Signature 

Signature 

# Personal Financial Statement Template

of: \_\_\_\_\_ (applicant(s))  
as of: \_\_\_\_\_ (enter date)

## Page 1: Assets

- 1) Cash- checking account(s) \_\_\_\_\_
- 2) Cash- liquid savings account(s) \_\_\_\_\_
- 3) Certificate(s) of Deposit \_\_\_\_\_  
CD Maturity Date(s): \_\_\_\_\_
- 4) Retirement Account(s) (IRA, 401k, etc) \_\_\_\_\_
- 5) Securities (Non Retirement)- stocks / bonds / mutual funds \_\_\_\_\_
- 6) Notes and/or Contracts Receivable \_\_\_\_\_
- 7) Life Insurance (cash surrender value) \_\_\_\_\_
- 8) Autos \_\_\_\_\_
- 9) Personal Property (jewelry, etc.) \_\_\_\_\_  
Description: \_\_\_\_\_
- 10) Real Estate Current Value (supported by attached property list) \_\_\_\_\_
- 11) Other Assets \_\_\_\_\_  
Description: \_\_\_\_\_
- 12) Other Assets \_\_\_\_\_  
Description: \_\_\_\_\_
- 13) Total Assets (combine lines 1-12)** \_\_\_\_\_

Signature of Applicant: \_\_\_\_\_

\_\_\_\_\_  
Date

Signature of Co-Applicant: \_\_\_\_\_

\_\_\_\_\_  
Date

**Page 2: Liabilities**

- 14) Credit Card(s) Balance \_\_\_\_\_  
Total Remaining Limit \_\_\_\_\_
- 15) Notes Payable \_\_\_\_\_  
Description: \_\_\_\_\_
- 16) Past Due Taxes \_\_\_\_\_
- 17) Certificates of Judgment \_\_\_\_\_  
Description: \_\_\_\_\_
- 18) Real Estate Mortgages (supported by attached property list) \_\_\_\_\_
- 19) Other Account(s) Payable \_\_\_\_\_  
Description: \_\_\_\_\_
- 20) Other Liabilities \_\_\_\_\_  
Description: \_\_\_\_\_
- 21) Total Liabilities (combine lines 14-20)** \_\_\_\_\_
- 22) Net Worth (Line 13 minus Line 21)** \_\_\_\_\_

Signature of Applicant: \_\_\_\_\_

\_\_\_\_\_

Date

Signature of Co-Applicant: \_\_\_\_\_

\_\_\_\_\_

Date

**Funding Application**

**Schedule of Property Owned (including any pending contracts for purchase or sale)**

	Street Address:	County	State	Purchase Date	Purchase Price	Current Value	Mortgage Balance	Mortgage Payment	Monthly Rent	Status*	Mortgage Holder	Title Holder
Primary Residence:	.....											
Investment 1:	.....											
Investment 2:	.....											
Investment 3:	.....											
Investment 4:	.....											
Investment 5:	.....											
Investment 6:	.....											
Investment 7:	.....											
Investment 8:	.....											
Investment 9:	.....											
Investment 10:	.....											

(Complete Multiple Schedules If You Own More Than 10 Investment Properties)

\*Status: R=Rented, V=Vacant, UC=Under Construction, FS=For Sale, ICS=In Contract to Sell, or ICB=In Contract to Buy

The Undersigned swears to the truth of the above information as of this \_\_\_\_\_ Day of \_\_\_\_\_, 20\_\_\_\_\_

Signature of Applicant: \_\_\_\_\_

Signature of Co-Applicant: \_\_\_\_\_