

Since 1986

SCHOOL CREDIT APPLICATIONReturn completed application with required financial information.

GENERAL INFORMATION

Legal Name of Lessee:			Fed.	Tax ID #:				
Address:								
City:	County:		State:	Zip:				
Contact Person:		Title:						
Phone: ()		Fax: ()					
Email Address:								
Alternative Contact Person:		Title:		Phone: ()			
Date school was established:		Does the school self-insur	re for property and	liability insurance?				
TRANSACTION INFORMATION								
Total Cost Equipment/Project:	\$	Term (years):						
*Down Payment: \$		Source of Down Payment	(fund name):					
Trade In: \$		Payment Amount: \$		Delivery Date:				
Other: \$		Payment Due:	☐ Advance	☐ Arrears				
Amount to Finance: \$		Payments:	☐ Quarterly	☐ Semi-Annual	☐ Annual			
*Lessee's down payment should be r	nade before or at delivery.	Proof of down payment is require	d prior to payment of a	any lease proceeds, unles	s otherwise negotiated.			
Has the lessee paid the vendor	for any portion of the	equipment being financed?	☐ Yes ☐ No If y	es, explain.				
What fund will the remaining lea	ase payments be made	e from? General Sp	ecial (specify)					
		EQUIPMENT DESCRI	PTION					
Equipment Description - including make and model (attach brochure if available):								
Approximately how many students/staff members will utilize the equipment?								
New Equipment:	☐ Yes ☐ No	If no, list the age of equip	ment or date manu	ufactured:				
Refurbished:	☐ Yes ☐ No	Year:						
Replacement:	☐ Yes ☐ No	Age of current equipment	:	Year purchased:				
If not a replacement, why is the	equipment needed?							
Buyout Included:	☐ Yes ☐ No	Amount of buyout include	d: \$					
Soft Costs Included:	☐ Yes ☐ No	Amount of soft costs inclu	ıded (shipping, sof	tware, and sales tax):	\$			
Physical location of equipment	after delivery:							
Describe the essential use of the equipment being purchased:								
BUILDING PROJECT								
Is the project an addition, renov	vation or a new building			ool own the land?] Yes 🔲 No			
Is the land cost included in the		☐ Yes ☐ No		the cost of the land?				
What is the physical address of		<u> </u>	<u> </u>					
Provide the current building's age, estimated market value, square feet, and brief description of facility layout:								
Provide a brief description of the addition, renovation, or new building:								
What is the essential use of the new project?								

SCHOOL CREDIT APPLICATION

FINANCIAL INFORMATION

If the school's expenditures exceeded revenues for any one of the last three years, explain why and what measures were taken to correct the

shortfall:								
Have the requested lease payments been included in the operation	ating budget?		□Yes	□No				
If no, explain.	_							
Has the lessee ever defaulted or non-appropriated on a lease,	□Yes	□No						
Will the lessee issue more than \$30,000,000 in tax-exempt deb	☐Yes	□No						
TAX LEVY INFORMATION								
Indicate the tax/mill levy for each year.								
Budget 2008-09: 2007-08:	2006-07:		2005-2006					
If the tax/mill levy can be raised, what are the procedures?								
Are there any voter imposed restrictions on taxing or spending	? □Yes	□No						
If yes, please explain:								
Indicate the assessed property value for each year.								
Budget 2008-09: 2007-08:	2006-07:		2005-2006:					
Indicate what percentage of taxes billed were actually collected	2005 2000							
Budget 2008-09: 2007-08:	2006-07:		2005-2006:					
Who are the three largest taxpayers and what percent of taxes	do tney represent?							
1. 2.		3	•					
DEMOGRAPHICS								
Indicate the average enrollment during each year:	☐ Daily Attendand	ce or \square	Annual Attendance					
Budget 2008-09: 2007-08:	2006-07:		2005-2006:					
Has the school been rated by a major rating agency?	☐ Yes ☐ No	Rating:	Agency:					
DISTRICT INFORMATION (If Applicable)								
DISTRICT INI	FORMATION (If		e)					
DISTRICT INI How many schools does the district represent?	FORMATION (If	Applicable	Yhat grade levels?					
	FORMATION (If	Applicable						
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858-451-0400 PH SAN DIEGO, CA SUITE # 1304-351 **SUITE # 300** 858-451-0033 FAX 92150 SAN DIEGO, CA 92128 SAN DIEGO, CA 92127

FEDEX / COURIER ADDRESS:

11835 CARMEL MT. RD.

• A lost deal fee will be charged to the lessee if the transaction fails to fund once the transaction has been credit approved and lease documents delivered

Web: www.investmentleasing.com Calif. Real Estate Broker License #00528469

MAILING ADDRESS:

P.O. Box 500110

PHONE / FAX:

800-400-5060 PH

CORPORATE ADDRESS:

11440 W. BERNARDO CT.