



Regional Micro-Enterprise Credential: Credit Application Fictional Profiles (Updated: August 1, 2018)

Attached are fictional business owner profiles you can use to complete the different applications required to attain the Regional Micro-Enterprise Credential.

Each profile is four pages long. The profiles contain:

Page 1: Personal Information (yellow) – includes personal information and banking relationships;

Page 2: Financial Profile (green) – includes all other personal assets and liabilities, income and expenditures;

<u>Page 3: Business Information (purple)</u> – includes types of business, ownership and either business results (for existing companies) or business projections (or new company start-ups); and

<u>Page 4: Trade References (orange)</u> – includes information on suppliers of the company.

There are four profiles you can choose among:

Name	Name of Company	Type of Business	Loan Requested	Purpose
Robin Smith	Quality Car Service and Repair	Car service and repair	\$40,000	New shop equipment
Amari Jones	Jones and Felder, LLC	Accountants	\$40,000	New computers / software
Jamie Ford	Family Restaurant	Restaurant	\$40,000	Start-up: a restaurant
Blake Felder	System Support Services	Computer Services	\$40,000	Start-up: new service firm

You can choose to be any of these individuals. You should use the information contained in the profile you select when you complete your credit applications.

Following the four personal profiles are four profiles of potential guarantors. Guarantors are individuals who are willing to provide a legal agreement to the bank that they will pay your company's debt payment if your company is unable to do so. The four guarantor profiles are:

- 1) Logan Lane
- 2) Kendall Hill
- 3) Quinn Thomas
- 4) Parker Carpenter

Your teacher will tell you which guarantor(s) may be available to help you with your small business.





My fictional name	e is:		Robin Smith Page 1: Personal Information											
			Page	1: Per	sonal In	format	ion							
Birth	ndate:	12/15	/1990			Soci	al Sec	urity Numbe	r:	441	-41-41	.41		
Home Street Addres	ss:					98 V	Valnut	: Drive						
City, Stat	e and Zip:		Ac	res, LA	70777			Years at	curren	it addre	ess:	2		
Home Phone	e Number:	3	818.555	5.4545			Cellpł	none Numbe	r:	504	.555.52	252		
Do I h	ave a drive	r's license?	Yes	\checkmark	Licens	e No:		864 454	4 321		N	lo		
Current Employer:	Quality Ca	r Service an	d Repa	ir				Pos	ition:	Ow	ner-M	echar	nic	
Nature of Business:	Automob	ile service fa	acility						Years	of Serv	/ice	8	3	
Stree	et Address					100	World	d Way						
City, Stat	e and Zip:	Harmo	ony, L/	A 77088										
Main Phone	Number:		31	8.555.1	.000			Fax Numbe	r:	318	.555.1	001		
Personal Bank		Ban	k of Ar	nerica		Bank Contact Jamie Fiel					ie Fielo	ds		
Stree	et Address		100 Corporate Drive											
City, Stat	e and Zip:		Ac	res, LA	70777			Phone		318.	555.60	60		
Checking Acco	ount Numbe	er 95-5844	58584					Current Ba	alance		\$11,0	000		
Savings Acco	ount Numbe	er none						Current Ba	alance					
Other Acco	ount Numbe	er none						Current Ba	alance					
Personal Brokerage		Chai	les Sch	nwab			N	lain Acct No:		AB-6	2-8844	88		
Stree	et Address					115 Co	orpora	te Drive						
City, Stat	e and Zip:		cres, LA	70777			Phone		318.	555.90	34			
	Company:	Procter &	k Gamb	ole		No. of	Share	s 100	V	alue	\$8	3,000		
Stock Holdings	Company:	Google				No. of	Share	<mark>s</mark> 50	V	alue	\$1	5,000)	
	Company:	Mutual F	unds			No. of	Share	<mark>s</mark> 100	V	alue	\$1	0,000)	





My fictional name is:	:					Rob	oin Smitl	h			
	I		Page 2	2: Fin	ancial P	rofil	e				
My monthly salary:	\$5,500 Mc	onthly Bo	onus/Com	nmiss	ion	none	e /	Annual Bonus	/Commi	ssion	\$10,000
Do I own or rent where	e I live?	(Dwn		\checkmark			Rent			
lf I c	wn a house, ł	now mu	ch is it wo	orth?	\$250,0	000					
How much is the mo	rtgage on my	house?	\$200,0	000	Mor	nthly	mortga	age or rent pa	yment:		\$900
Other Real Estate: Address	Туре	Yea Acqui		Marke Value		Mort Bala	gage ince	Mortgage Holder	Mont Paym	•	Monthly Net Income
None											
Other Notes Payable	Creditor	Date	of Loan	1	Maturity	'	Cur	rent Balance	N	1onth	ly Payment
Car Loan	Enterprise	12/1	5/2015	12	2/15/2019 \$20,00			\$20,000			\$500
Credit Card Balance	Chase							\$3,000			\$300
Other Assets	s Owned		Dollar Va	lue			Other A	nnual Income	9		Dollar Value
Vehicles			\$25,00	0	Spouse	sala	ry/wage	es/bonuses /o	commissi	ons	\$0
Household and Persona	al Items		\$5,000)	Alimony	y or (child su	pport your re	ceive		\$0
All Other Assets					All other income (including dividends)						\$800
Annual or Monthly E	xpenditures (ı	not inclu	ided abov	e)		Monthly	,		Ann	iual	
Insurance: Housing										\$1,0	000
Maintenance and Taxe	s: Housing									\$4,0	000
Utilities (Electric, Gas, V	Nater, Sanitat	ion, Cal	ole, Interr	let)			\$250				
Telephone (landline, ce	ellphone)						\$200				
Healthcare (doctor, de	ntist, prescrip	tions, ot	:her)							\$1,(000
Groceries							\$600				
Clothing										\$1,0	000
Vehicle Costs (gas, insu					<u> </u>		\$500				
	Entertainment Costs (dining out, vacations, other)									\$1,8	
Insurance: Other (life, r	medical, other	-)								\$1,0	000
Pets											
Gifts										\$2,0	
All Other Expenses	ogional Micro									\$50	00





My fictional nam	Robin	Smit	th											
	•			Page 3: Busine	ss I	Informatio	n							
Company Name:	Quality C	ar Servic	e and	Repair				Date I	Estal	olishe	ed	Dec	15, 2011	
Nature of Business:	Automo	bile servi	ice fac	cility										
Type of Business:	Corporati	on	Sole	Proprietorship		LLC (Limit	ed Liabi	ility Corp)	\checkmark	Par	tnership		Other	
Stre	et Address					100 V	Vorlo	d Way						
City, Sta	te and Zip:			Harmony, LA 7	770	88		Yea	ars a	t cur	rent add	ress:	4	
Main Phon	e Number:			318.555.1000)			Fax Nu	umbo	er:	31	8.55	5.1001	
Email:		info@q	uality	<u>vcar.com</u>			W	/ebsite:		v	www.qua	lityc	ar.com	
	Name of	Owner /	Share	eholder				Title o	r "N	ot Ac	ctive"	%	6 Owners	hip
Robin Smith								P	resi	dent			80%	
Blair Smith			N	ot A	ctive	2		20%						
Financial Resul	Financial Results / Projections Actual										ns			
Annual c	or Monthly	Revenue	es (not	t included above	e)			Mor	nthly	,		Α	nnual	
Service Revenues							\$24,000							
Merchandise Rever	nues						\$8,000							
Other Revenues							\$20,000							
			Avera	age Transactions	s pe	er Month		20	00					
	Annual or	Monthly	Expe	nditures				Mor	nthly	,		A	nnual	
Cost of Goods Sold								\$4 <i>,</i>	000					
Salaries and Wages								\$14	,000					
Rent and Utilities								\$3 <i>,</i>	500					
Insurance								\$1,	500					
Debt Service								\$1,	000					
Advertising												\$	5,000	
Outside Services (accountants, lawyers)												\$1	2,000	
Maintenance Costs	(facility, ed	quipment	t)				\$20,000							
All Other Expenses							\$6,000				5,000			
Α	ssets			Current Value		Liabilities					Cu	rrent Valı	ue	
Inventory				\$40,000	Line of Credit: Amount Requested \$40,0			\$40,000						
Equipment (includi	D Equipment-related Debt (current equipment) \$20,000													
Accounts Receivabl	e (payments due	e from custom	ners)	\$10,000		Accounts	Paya	ble (paym	ients d	ue to s	uppliers)		\$24,000	





All Other Assets			\$20,000	All Other Li	abilities		\$10,000		
My fictional name i	s:			Robin S	Smith				
			Page 4: Trade	References					
Company Name			Bolt Parts		Contact		J Bolt		
Business Rela	tionship			Sup	oplier				
Street	Address			200 W	orld Way				
City, State	and Zip:	н	armony, LA 7708	3	Phone	318.	555.3212		
	Email			jbolt@bo	ltparts.com				
Company Name		Lisa	a Bookkeeping	BI	air Lisa				
Business Rela	tionship			Bookkeep	ing Services				
Street	Address	100 Corporate Way							
City, State	and Zip:	н	armony, LA 7763	3	Phone	318.	555.4469		
	Email			bestbookkee	pers@lisa.com				
Company Name		Effectiv	ve Marketing, Inc.		Contact	Cas	ey Forte		
Business Rela	tionship		Dire	ct Mailing Ac	lvertising Comp	bany			
Street	Address	200 Corporate Way							
City, State	and Zip:	Н	armony, LA 7763	318.	555.1123				
	Email	casey@effectivemarketing.com							





My fictional name	e is:					Ama	ari Jon	es					
			Page	1: Per	sonal Inf	ormati	ion						
Birth	ndate:	12/15	/1985			Soci	al Sec	urity Numbe	r:	551	L-51-51	.51	
Home Street Addres	ss:					90	Pine S	treet					
City, Stat	e and Zip:		Fo	rest, LA	70666			Years at	curren	t addr	ess:	10	
Home Phone	Number:	3	818.55	5.6868	-		Cellpł	none Numbe	r:	225	.555.3	434	
Do I h	ave a drive	r's license?	Yes	\checkmark	License	e No:		983 287	7 139		N	lo	
Current Employer:	Jones and	Felder, LLC						Key Co	ntact:	C)ylan F	elder	
Nature of Business:	Accounta	nts							Years	of Serv	vice	12	
Stree	et Address					300	World	d Way					
City, Stat	y, State and Zip: Harmony, LA 77088												
Main Phone	e Number:		31	.8.555.5	6467			Fax Numbe	r:	318	.555.5	468	
Personal Bank		Na	National Bank Bank Con					ank Contact		Сос	dy Fran	k	
Stree	et Address		100 Division Drive										
City, Stat	e and Zip:		Fo	rest, LA	70623			Phone		318.	555.04	04	
Checking Acco	ount Numbe	er 98-893-3	30093					Current Ba	alance		\$24,	000	
Savings Acco	ount Numbe	er none						Current Ba	alance				
Other Acco	ount Numbe	er none						Current Ba	alance				
Personal Brokerage			Fidelity	/			Μ	ain Acct No:		SP-55	5-6434	487	
Stree	et Address					115 [Divisio	n Drive					
City, Stat	e and Zip:	Forest, LA 70623						Phone		318.	555.89	13	
	Company:	IBM				No. of	Share	s 100	V	alue	\$1	3,000	
Stock Holdings	Company:	Apple				No. of	Share	s 100	V	alue	\$1	2,000	
	Company:	Mutual F	unds			No. of	Share	s 200	V	alue	\$3	0,000	





My fictional name is	5:					Am	ari Jone	S			
			Pa	ge 2: Fii	nancial	Profile	e				
My monthly salary:	\$6,250	Monthly I	Bonus/(Commiss	sion	none	e /	Annual Bonus	/Commi	ssion	\$2,000
Do I own or rent wher	e I live?		Own			/		Rent			
IfI	own a hous	se, how m	uch is it	worth?	\$280),000					
How much is the mo	ortgage on	my house	? \$2	00,000	М	onthly	mortga	age or rent pa	yment:		\$900
Other Real Estate: Address	Туре	Ye Acqu		Mark Valu		Mort Bala		Mortgage Holder	Mont Paym	•	Monthly Net Income
None											
Other Notes Payable	Credito	r Date	e of Loa	n	Maturi	ty	Cur	rent Balance	N	1onth	ly Payment
Car Loan	Enterpris	se 12/	15/201	2 1	12/15/2016 \$20,0			\$20,000		9	\$700
Credit Card Balance	Capital O	ne						\$0			
				1							
Other Asset	s Owned		Dollar	Value			Other A	nnual Income	9		Dollar Value
Vehicles			\$30	,000	Spous	se sala	ry/wage	es/bonuses /c	ommissi	ons	\$0
Household and Persor	al Items		\$10	,000	Alimo	ony or o	child su	pport your ree	ceive		\$0
All Other Assets					All other income (including dividends)						\$2,000
Annual or Monthly E	Expenditure	es (not inc	luded a	bove)	Monthly					Ann	ual
Insurance: Housing										\$1,0	000
Maintenance and Taxe	es: Housing	5								\$3,0	000
Utilities (Electric, Gas,	Water, Sar	nitation, Ca	able, Int	ternet)			\$250				
Telephone (landline, c	ellphone)						\$200				
Healthcare (doctor, de	entist, preso	criptions, o	other)							\$1,0	000
Groceries							\$600				
Clothing										\$1,0	000
Vehicle Costs (gas, ins	Vehicle Costs (gas, insurance, maintenance, taxes)										
	Entertainment Costs (dining out, vacations, other)									\$4,0	
	nsurance: Other (life, medical, other)									\$1,0	000
Pets											
Gifts										\$2,0	
All Other Expenses								-09- Page 7 of		\$1,0	000





My fictional nam	Amari Jones														
	·		Page 3: Busi	ness	Inform	natio	n								
Company Name:	Jones and	d Felder, L	LC				ſ	Date E	stak	olish	ed	De	ec 1	5, 2008	
Nature of Business	Account	ants													
Type of Business:	Corporati	ion	Sole Proprietorsh	ip	LLC	C (Limite	ed Liability	y Corp)	\checkmark	Pa	rtnersh	ip		Other	
Stre	et Address				:	300 W	Vorld V	Nay							
City, Sta	te and Zip:		Harmony, L	A 77	088			Yea	ars a	t cu	rrent ad	ddre	ss:	4	
Main Phon	e Number:		318.555.5	467			F	ax Nu	ımbe	er:	3	318.5	555	5468	
Email:	info@jone	esandfelde	erllc.com	W	/ebsite	e:	ww	w.jon	esar	ndfe	lderacc	oun	tant	s.com	
	Name of	Owner / S	hareholder				Т	itle or	r"No	ot A	ctive"		%	Ownersh	nip
Amari Jones								Seni	ior P	Partr	ner			50%	
Dylan Felder		Senior Partner							50%						
Financial Resu	ts / Projec	tions	Actual			\checkmark		P	Proje	ectio	ons	I			
Annual	or Monthly	Revenues	(not included abo	ove)			Monthly						An	nual	
Service Revenues								\$30,	000						
Merchandise Reven	nues														
Other Revenues							\$12,000								
			Average Transacti	ons p	per Mo	onth		5							
	Annual or	Monthly I	Expenditures					Mon	thly	1			An	nual	
Cost of Goods Sold															
Salaries and Wages	;							ć 2 1	-00				Ş21	0,000	
Rent and Utilities								\$3,5 \$1,5							
Insurance Debt Service								Ş1,5	500						
Advertising							\$1,000								
Outside Services (accountants, lawyers)								+-/-					\$4	,000	
Maintenance Costs	(facility, ed	quipment)											\$3	,000	
All Other Expenses							\$1,500								
ŀ	Assets		Current Va	lue		Liabilities						Cur	rent Valu	ie	
Inventory			\$0		Line	of Cre	edit: A	moun	nt Re	que	sted		ç	40,000	
Equipment (includi	pmen	t-relat	ed De	bt					\$5,000						
Accounts Receivab	e (payments du	e from custome	rs) \$30,000		Acco	unts F	Payabl	e (paym	ents d	ue to s	suppliers)			\$6,000	





All Other Assets			\$10,000	All Other Li	abilities		\$6,000		
My fictional name i	s:			Amari .	lones				
			Page 4: Trade I	References					
Company Name		Lightning	Temporary Servic	es	Contact	Devoi	n Lightning		
Business Rela	itionship		Т	emp Service	for Bookkeeper	ſS			
Street	Address			600 W	orld Way				
City, State	and Zip:	н	armony, LA 77088	3	Phone	318.	555.2908		
	Email			<u>dlightnir</u>	g@lts.com				
Company Name		System	Blak	ke Felder					
Business Rela	itionship			Comput	er Services				
Street	Address	900 Corporate Way							
City, State	and Zip:	н	armony, LA 77638	3	Phone	318.	555.8018		
	Email			<u>blake(</u>	@cs.com				
Company Name		Effectiv	ve Marketing, Inc.		Contact	Cas	ey Forte		
Business Rela	itionship		Dire	ct Mailing Ac	lvertising Comp	bany			
Street	Address	200 Corporate Way							
City, State	and Zip:	Н	armony, LA 77638	318.	555.1123				
	Email	casey@effectivemarketing.com							





My fictional name	e is:		Jamie Ford Page 1: Personal Information										
			Page	1: Per	sonal In	format	ion						
Birth	ndate:	12/15	/1995			Soci	al Sec	urity Number	:	321-	-71-78	311	
Home Street Addres	ss:					99 (Cherry	Lane					
City, Stat	e and Zip:		Sea	side, LA	A 70777			Years at o	curren	t addre	ss:		1
Home Phone	Number		318.555	5.1616			Cellph	one Number	:	225.	535.1	617	
Do I h	ave a driv	er's license?	Yes	\checkmark	Licens	e No:		546 897	213		٦	٥V	
Current Employer:	Welcom	e Inn Restaur	ant					Pos	ition:	Assis	tant N	√an	ager
Nature of Business:	Food Se	rvice							Years	of Serv	ice		8
Stree	Street Address 333 Welcome												
City, Stat		Harmo	ony, LA	77444									
Main Phone	e Number:		31	8.555.0	953			Fax Number	:				
Personal Bank			Chase Bank Cor							Harley	Ham	ilton	1
Stree	et Address		180 Corporate Drive										
City, Stat	e and Zip:		Aci	res, LA	70777			Phone		318.5	55.78	312	
Checking Acco	ount Num	<mark>per</mark> 15-453-	098163					Current Ba	lance		\$1,0)00	
Savings Acco	ount Num	<mark>per</mark> none						Current Ba	lance				
Other Acco	ount Num	per none						Current Ba	lance				
Personal Brokerage		<u>.</u>	none				М	ain Acct No:		•			
Street Address													
City, Stat					Phone								
	y:	No. of Shares					s	V	alue				
Stock Holdings	Compan	: No. of S			Share	s	V	alue					
	Compan	y:				No. of	Share	s	V	alue			





My fictional name is	:						Jan	nie For	d			
				Page 2	: Fin	ancia	l Profil	е				
My monthly salary:	\$3,000	Month	y Boni	us/Com	miss	ion	none	e	Annual Bonus	/Commis	sion	\$0
Do I own or rent where	e I live?		Ow	'n					Rent		\checkmark	,
lf I c	wn a hou	use, how	much	is it wo	rth?							
How much is the mo	rtgage oi	n my hou	se?			Ν	/lonthly	morte	gage or rent pa	yment:		\$800
Other Real Estate: Address	Туре	_	Year quireo		∕larke Value		Mort Bala		Mortgage Holder	Month Payme	•	Monthly Net Income
Other Notes Payable	Credit	tor D	ate of	Loan	1	Matur	ity	Cu	rrent Balance	M	onthl	y Payment
Other Assets	s Owned		Do	ollar Va	lue			Other /	Annual Income	2		Dollar Value
Vehicles				\$5,000)	Spou	se sala	ry/wag	es/bonuses /c	ommissic	ons	\$0
Household and Person	al Items			\$3,000)	Alim	ony or o	child su	upport your red	ceive		\$0
All Other Assets						All other income (including dividends)					\$8,000	
Annual or Monthly E	xpenditu	res (not i	nclude	ed abov	e)	Monthly Ani					Ann	ual
Insurance: Housing												
Maintenance and Taxe	s: Housi	ng										
Utilities (Electric, Gas, V			Cable	, Intern	et)			\$150				
Telephone (landline, ce	ellphone)							\$150				
Healthcare (doctor, de	ntist, pre	scription	s, othe	er)							\$2,0	00
Groceries								\$400				
Clothing											\$50	00
Vehicle Costs (gas, insurance, maintenance, taxes)								\$300				
Entertainment Costs (dining out, vacations, other)											\$2,0	
.	Insurance: Other (life, medical, other)										\$1,0	
Pets											\$50	
Gifts											\$1,0	
All Other Expenses											\$1,0	00

Regional Micro-Enterprise Credential: 2018-2019 Resource 06-09- Page 11 of 21





My fictional nam	Jamie	e Ford	I												
				Page 3: Busine	ss I	nformatio	n								
Company Name:	Family Re	estaurant	:					Date E	stak	olish	ed	plan	: ne	ext quart	er
Nature of Business:	Local re	staurant	(brea	kfast and lunch)											
Type of Business:	Corporati	ion	Sole	Proprietorship		LLC (Limit	ed Liabili	ity Corp)	\checkmark	Par	tnersh	nip		Other	
Stre	et Address					550 V	Vorld	Way							1
City, Sta	te and Zip:			Harmony, LA	770	88		Yea	irs a	t cur	rent a	ddro	ess:	4	
Main Phon	e Number:			318.555.4938	3			Fax Nu	mbe	er:			nor	e	
Email:	j	amiefor	12@	gmail.com			We	ebsite:				no	ne		
	Name of	Owner /	Share	eholder				Title or	- "No	ot Ac	ctive"		%	Owners	hip
Jamie Ford									Owr	ner				100%	
Financial Resul	Financial Results / Projections Actual										ons			\checkmark	
Annual c	or Monthly	Revenue	es (no	t included above	e)			Mon	thly	,			Ar	nual	
Service Revenues	-														
Merchandise Rever	nues						\$35,000								
Other Revenues								\$1,0	000						
			Aver	age Transaction	s pe	er Month		50	0						
	Annual or	Monthly	Expe	nditures				Mon	thly	,			Ar	nual	
Cost of Goods Sold							38	8% of r	ever	nues					
Salaries and Wages							33	3% of r	ever	nues					
Rent and Utilities								\$3 <i>,</i> 5	500						
Insurance								\$1,5	500						
Debt Service								\$8	00						
Advertising								\$1,0	000						
Outside Services (accountants, lawyers)								\$1,0	000						
Maintenance Costs	(facility, e	quipmen	t)				\$1,500								
All Other Expenses							\$2,000								
Α	ssets			Current Value		Liabilities						Cur	rent Val	ue	
Inventory				\$10,000		Lines of Cr	redit:	Amou	nts l	Borr	owed			\$40,000	
Equipment (including owned vehicles) \$25,000 Equip								D Equipment-related Debt \$0							
Accounts Receivabl	e (payments du	e from custon	ners)			Accounts I	Payab	le (paym	ents d	ue to s	uppliers)			\$6,000	





All Other Assets			\$5,000	All Other Li	abilities		\$4,000					
My fictional name i	s:			Jamie	Ford							
			Page 4: Trade I	References								
Company Name		Sudden	Restaurant Supplie	es	Contact	Samm	nie Sudden					
Business Rela	itionship			Sup	oplier							
Street	Address			5500 W	orld Way							
City, State	and Zip:	Н	armony, LA 77099	Ð	Phone	318.	555.8798					
	Email											
Company Name		Lisa	a Bookkeeping		Contact	Blair Lisa						
Business Rela	itionship		Bookkeeping Services									
Street	Address		100 Corporate Way									
City, State	and Zip:	Н	armony, LA 77638	3	Phone	318.	555.4469					
	Email			bestbookkee	pers@lisa.com							
Company Name		Effecti	ve Marketing, Inc.		Contact	Cas	ey Forte					
Business Rela	itionship		Dire	ct Mailing Ac	lvertising Comp	bany						
Street	Address			200 Corp	orate Way							
City, State	and Zip:	Н	armony, LA 77638	318.555.1123								
	Email	casey@effectivemarketing.com										





My fictional name	e is:					Blak	e Felde	r						
			Page	1: Per	sonal Inf	ormat	ion							
Birth	ndate:	12/15	5/1992			Soci	al Secur	ity Number	:	323-	98-98	310		
Home Street Addres	ss:					44	Elm Str	eet						
City, Stat	e and Zip:		Ac	res, LA	70777			Years at o	current	t addres	is:		3	
Home Phone	e Number:						Cellpho	ne Number	:	318.5	3.500.2301			
Do I h	ave a driv	er's license?	Yes	\checkmark	License	No:		111 230	888		Ν	10		
Current Employer:	Compute	r Consultant	s, Inc.					Posi	tion:	C	onsul	tant	:	
Nature of Business:	Comput	er Consulting	5						Years of Service 6					
Stree	et Address				ļ	is Way								
City, Stat	e and Zip:		Harmony, LA 77501											
Personal Bank		Friendly N	leighbo	orhood	Bank		Ba	nk Contact		Marley	Frier	ndly		
Stree	et Address		1201 Corporate Drive											
City, Stat	e and Zip:		Ac	res, LA	70755			Phone		318.5	3.555.1299			
Checking Acco	ount Numb	er 120-825	64-3625	54				Current Ba	lance		\$3,0	000		
Savings Acco	ount Numb	er none						Current Ba	lance					
Other Acco	ount Numb	er none						Current Ba	lance					
Personal Brokerage							Ma	in Acct No:						
Stree	et Address													
City, Stat	e and Zip:	Phone												
	Company	':				No. of	Shares		Va	alue				
Stock Holdings	Company	·:				No. of	Shares		Va	alue				
	Company	':				No. of	Shares		Va	alue				





My fictional name is	:							Blak	ke Feld	er		
				Pa	age 2:	: Fin	ancia	l Profile	е			
My monthly salary:	\$6,000	Мо	nthly E	Bonus,	/Com	miss	ion	none	2	Annual Bonus	/Commission	none
Do I own or rent where	e I live?			Own						Rent	·	/
lf I c	wn a ho	use, h	ow mi	uch is	it wor	rth?						
How much is the mo	rtgage o	n my l	house	?	-		Ν	1onthly	mortg	age or rent pa	yment:	\$600
Other Real Estate: Address	Тур	e	Ye Acqu			1arke Value		Mort Bala		Mortgage Holder	Monthly Payment	Monthly Net Income
None												
Other Notes Payable										rrent Balance	Month	ly Payment
Credit Card Balance	redit Card Balance Chase									\$3,000		\$300
Other Assets Owned Dollar Value									Other A	Annual Income		Dollar Value
Vehicles				\$2	0,000)	Spou	se sala	ry/wag	es/bonuses /c	ommissions	\$0
Household and Person	al Items			\$ <u></u>	5,000		Alimo	ony or o	child su	upport your rea	ceive	\$0
All Other Assets							All ot	ther inc	ends)	\$0		
Annual or Monthly E	xpenditu	ires (n	ot incl	uded	above	e) Monthly						iual
Insurance: Housing											\$2	50
Maintenance and Taxe	s: Housi	ng										
Utilities (Electric, Gas,	Water, S	anitat	ion, Ca	able, li	nterne	et)			\$200			
Telephone (landline, ce	ellphone)							\$250			
Healthcare (doctor, de	ntist, pre	script	ions, c	other)							\$1,0	000
Groceries									\$600			
Clothing											\$3,0	000
Vehicle Costs (gas, insu	irance, n	nainte	nance	, taxes	5)				\$500			
Entertainment Costs (dining out, vacations, other)									\$200			
Insurance: Other (life, i	medical,	other)								\$1,0	000
Pets											\$1,0	000
Gifts											\$2,0	000
All Other Expenses											\$1,0	000

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My fiction	nal name	e is:						Blake Felder										
						Page 3: Busin	ess	Inform	natio	n								
Company	Name:	System	Suppo	rt Ser	rvices	5				1	Date	Esta	blis	hed	plar	n: ne	ext quart	er
Nature of B	Business:	Comp	uter Su	pport	t Serv	vices for Small	Bus	siness	es an	d Afflu	ent F	amil	ies					
Type of Bus	siness:	Corpora	ation	9	Sole F	Proprietorship		LL	C (Limit	ed Liabilit	y Corp)	\checkmark	Pa	artner	ship		Other	
	Stree	et Addres	ss						44 E	Im Stre	eet		<u> </u>					<u>I</u>
(City, Stat	e and Zi	p:			Acres, LA 7	077	77			Ye	ars a	at ci	urrent	addr	ess:	(horr	ıe)
	in Phone					318.500.23)1			F	ax N	umb	er:					
Email:				msup	ports	ervices.com			W	ebsite				stems	oqqu	rtse	rvices.co	m
														Active			Owners	
Name of Owner / Shareholder Blake Felder												Presi					100%	
Diake relac												1031	uci				100/0	
Financia	ial Result	s / Proie	ections			Actual				Projections						v		
					(not	included abov	re)			Monthly						Annual		
Service Rev			,		·		,					,000						
Merchandis	se Reven	ues								\$5,000								
Other Reve	nues									\$2,000								
				A	Avera	ge Transactio	ns p	oer Mo	onth		-	30						
		Annual o	or Mon	thly E	Expen	ditures					Мо	nthly	y			Ar	nnual	
Cost of Goo	ods Sold									65%	of m	erch	anc	lise				
Salaries and	d Wages										\$15	5,000)					
Rent and Ut	tilities																	
Insurance												,500						
Debt Service												800						
Advertising	•			<u> </u>							Ş2,	,000						
Outside Services (accountants, lawyers) Maintenance Costs (facility, equipment)																	5,000	
All Other Ex		(racinty,	equipn	nent)												-	1,000 2,000	
	•	ssets				Current Valu	e						rrent Val	ue				
Inventory	~					\$5,000	-	Line	of Cr	edit: A			eau	ested			\$40,000	
	Equipment (including owned vehicles) \$25,000 Equipm																,,	
Accounts Re	-	-			rs)	\$25,000				Payabl			due te	o supplier	s)		\$6,000	





All Other Assets			\$5,000	All Other Li	abilities		\$3,000					
My fictional name	is:			Blake F	elder							
			Page 4: Trade I	References								
Company Name		Cru	nch Computers		Contact	Kell	y Krunch					
Business Rela	ationship			Sup	oplier							
Street	Address			12 Wo	orld Way							
City, State	and Zip:	Н	armony, LA 7701	318.	555.0080							
	Email											
Company Name		Lisa	a Bookkeeping		Contact	BI	air Lisa					
Business Rela	ationship		Bookkeeping Services									
Street	Address		100 Corporate Way									
City, State	and Zip:	Н	armony, LA 77638	3	Phone	318.	555.4469					
	Email			bestbookkee	pers@lisa.com							
Company Name		Effecti	ve Marketing, Inc.		Contact	Cas	ey Forte					
Business Rela	ationship		Dire	ct Mailing Ac	lvertising Comp	bany						
Street	Address			200 Corp	orate Way							
City, State	and Zip:	Н	armony, LA 77638	318.	555.1123							
	Email	casey@effectivemarketing.com										





Guarantor Nam	e					Lo	gan Lan	e						
Birth	ndate:	12/1	5/55			Soc	ial Secu	rity Number:		132	-98-00	02		
Home Street Addres	ss:					44	Beech G	irove						
City, Stat	e and Zip:		Fre	edom, l	A 7001	1		Years at c	urrent	t addre	ss:	30		
Home Phone	Number:	2	25.55	5.4001			Cellph	one Number:		318.	555.62	5.6226		
Do I h	ave a drive	r's license?	Yes	\checkmark	Licen	se No:		763 003	330		N	ο		
Personal Bank		Ban	k of A	merica			Ba	ank Contact		Terry	/ Point	er		
Stree	et Address					4646	6 Pointe	r Place						
City, Stat	e and Zip:		Alex	ander, l	LA 799:	11		Phone		318.555.0129				
Checking Acco	ount Numb	er 95-5844	58584	1				Current Bal	ance		\$80 <i>,</i> 0	000		
Savings Acco	ount Numb	er 91-4842	03831	L				Current Bal	ance		\$250,	000		
Other Acco	ount Numb	er 89-6473	63847	7 (IRA a	ccount)			Current Bal	ance	C T	\$2,000	,000		
Personal Brokerage			Fidelity Main Acct No:							32-138-09302				
Stree	et Address					2424	Battalio	on Circle						
City, Stat	e and Zip:		73913	Phone		318.5	555.04	5.0404						
	Company:	Procter 8	Gam	ble		No. o	f Shares	5,000	Va	alue	\$4(\$400,000		
Stock Holdings	Company	Apple				No. o	f Shares	10,000	Va	alue	\$1,0	00,000		
	Company	Mutual F	unds			No. o	f Shares	10,000	Va	alue	\$3,0	00,000		
Annual Comp	ensation (a	ll sources)		\$500	\$500,000 All Other Annual Income (all sources)						;) \$	250,000		
Position / Employer		CEO of Fre	edom	n Real Es	state									
Do I own or rent wh	ere I live?		Own		,	\checkmark		Rent						
If	f I own a ho	use, how m	uch is	it worth	ı?			\$1,000	000					
How much is the	mortgage c	on my house	?	1	١	Monthly	/ mortga	age or rent pa	aymen	t:	\$	0		
Other Real Estate: Address	Тур	e Ye Acqu		Mai Va	rket lue		tgage ance	Mortgage Holder		onthly yment		Ionthly t Income		
Eagle Office Park	Office	Bldg 19	35	\$2,00	0,000	\$1,00	0,000	Chase	\$5	5,000	Ş	30,000		
Other Notes Payabl	e Credi	litor Date of Loan Maturity Current Balance							Mont	hly Pa	yment			





Guarantor Nam	e						Ker	idall Hil	I						
Birth	ndate:		12/1	5/70			Soci	al Secu	rity Number:		562-3	4-011	1		
Home Street Addres	ss:					•	132	Willow	Drive						
City, Stat	e and Zip	:		Fre	edom, LA	A 7001	1		Years at cu	urrent	address	5:	10		
Home Phone	e Number	:	2	25.55	5.6503			Cellpho	one Number:		504.55	55.612	.9		
Do I h	ave a driv	ver's lic	cense?	Yes	\checkmark	Licens	se No:		673 030 3	355		No			
Personal Bank			Ban	k of A	merica			Ba	ink Contact		Terry F	Pointe	r		
Stree	et Addres	5					4646	Pointer	Place						
City, Stat	e and Zip	:		Alex	kander, L	A 7991	11		Phone		318.55	5.0129	.0129		
Checking Acco	ount Num	ber 9	95-0019	3948	5				Current Bala	ance	0				
Savings Acco	ount Num	ber							Current Bala						
Other Acco	ount Num	ber 8	89-201903934 (IRA account)Current Balance\$2								200,00	00			
Personal Brokera	age		Schwab Main Acct No: YY-98-83928							3					
Stree	et Addres	5	101 Battalion Circle												
City, Stat	e and Zip	:		F	ort, LA 7	73921 Phone 318.555.9120						כ			
	Compar	y: N	lutual F	unds			No. of	Shares	500	Va	lue	ue \$300,000			
Stock Holdings	Compar	y:					No. of	Shares		Valu					
	Compar	y:					No. of	Shares		Va	lue	1			
Annual Comp	ensation	(all sou	urces)		\$90	,000	All	Other A	nnual Income	e (all so	ources)	\$1	0,000		
Position / Employer		Ch	ief Fina	ncial (Officer (C	FO), Li	berty El	ectronio	cs						
Do I own or rent wh	ere I live	?		Own		•			Rent						
	fIownal	nouse,	how mu	ich is	it worth?	?			\$500,0	00					
How much is the	mortgage	on my	y house	\$	350,000	Ν	/onthly	mortga	ige or rent pa	yment	::	\$1,60	00		
Other Real Estate: Address	T	/pe	Ye Acqu		Marl Valu		Mort Bala		Mortgage Holder		nthly ment		onthly Income		
Other Notes Pay	able	Creditor			Date of	Loan	Mat	urity	Current Bal	ance	Monthly Payment				
Vehicle Loan			GMAC		12/15	5/15	12/1	5/20	\$80,000	\$1,500					
Home Improvemen	t Loan	Bank	nk of America 12/15/11			12/1	5/21	\$100,00	0		\$1,4	00			





Guarantor Nam	е							Qui	nn Thoi	mas					
Birth	ndate:			12/15/	90			So	cial Sec	urity Numbe	:	98	5-10	-0102	
Home Street Addres	ss:							88 E	vergre	en Lane					
City, Stat	e and Z	ip:			Fre	edom, L/	A 7005	5		Years at	curre	ent addi	ress:		3
Home Phone	Numb	er:		225	5.55	5.8893			Cellpl	hone Numbei	:	504	4.55	5.9930	
Do I h	ave a d	river	's licer	nse? \	/es	\checkmark	Licens	se No:		847 387	784			No	
Personal Bank				Bank o	of A	merica			E	Bank Contact		Ter	ry Po	binter	
Stree	et Addre	ess						464	6 Point	er Place					
City, Stat	e and Z	ip:			Alex	ander, L	A 7991	L1		Phone		318	.0129		
Checking Acco	ount Nu	mbe	r 95-	-584458	8584	ļ				Current Ba	lance	2	\$2	20,000	
Savings Acco	ount Nu	mbei	r							Current Ba	lance	e			
Other Acco	ount Nu	mbei	r 88-	-243947	644	I (IRA ac	count)			Current Ba	lance	2	\$2	20,000	
Personal Brokera	age			F	ide	lity			N	lain Acct No:		45-4	455-6	50598	
Stree	et Addre	ess		2424 Battalion Circle											
City, Stat	e and Z	ip:			Fort, LA 73913					Phone		318.55		555.0404	
	Compa	any:	Mut	tual Fun	ds			No. c	of Share	s 100		Value		\$10,000	
Stock Holdings	Compa	any:						No. c	of Share	s	Valu				
	Compa	any:						No. c	of Share	s		Value			
Annual Comp	ensatio	n (all	sourc	ces)		\$65	,000	Al	l Other	Annual Incon	ne (al	l source	es)	\$5 <i>,</i> (000
Position / Employer			Mana	ager, M	cDo	onalds (Freedom loo			ion)						
Do I own or rent wh	ere I liv	e?		0	wn					Rent	Rent			\checkmark	
If	flowna	a hou	use, ho	ow muc	h is	it worth?	?								
How much is the	mortga	ge or	n my h	ouse?			Ν	/lonthl	y mort	gage or rent p	ayme	ent:		\$1,200	
Other Real Estate: Address		Туре	2	Year Acquir		Marl Valı			tgage ance	Mortgage Holder		Monthl Paymen		Mon Net In	•
Other Notes Pay	Other Notes Payable (Date of	f Loan	Ma	turity	Current B	alanc	alance		Monthly Payment	
Vehicle Loan	Vehicle Loan BMW Fi					12/15	5/13	12/	15/19	\$60,0	00			\$1,500)





Guarantor Nam	e							Parker	Carpe	nter							
Birth	ndate:		12/1	5/55				Soc	ial Secu	rity Number	:	776-2	8-483	7			
Home Street Addres	ss:							98 5	apling	Court							
City, Stat	e and Zip	:		Free	edom,	LA 70	0014	Ļ		Years at o	current	addres	5:	30			
Home Phone	e Number	:	2	25.55	5.9011	1			Cellph	one Number	:	504.555.0918					
Do I h	ave a driv	ver's li	icense?	Yes	\checkmark	Lie	cens	e No:		546 213	090		No)			
Personal Bank			Ban	k of Ar	nerica)			Ba	ank Contact		Terry l	Pointe	r			
Stree	et Address	5						4646	Pointe	r Place							
City, Stat	e and Zip	:		Alex	ander,	, LA 7	7991	1		Phone		318.55	5.012	9			
Checking Acco	ount Num	ber	95-5844	58584						Current Ba	lance		\$80,0	00			
Savings Acco	ount Num	ber								Current Ba	lance						
Other Acco	ount Num	ber	86-8474	90838	(IRA	ассог	unt)			Current Ba	lance	4	200,0	00			
Personal Brokerage			Mai						in Acct No:								
Stree	et Address	5							•								
City, Stat	e and Zip	:	Phone														
	Compan	y:						No. of	Shares		Va	lue					
Stock Holdings	Compan	y:						No. of	Shares		Va	lue					
	Compan	y:						No. of	Shares		Va	lue					
Annual Comp	ensation (all so	urces)		\$5	56,00	00	All	Other A	Innual Incom	e (all so	ources)		\$0			
Position / Employer		Re	etired														
Do I own or rent wh	ere I live i)		Own			V	/		Rent							
It	f I own a h	nouse,	, how mu	uch is i	it wort	th?				\$300,	000						
How much is the	mortgage	on m	ny house	? \$	50,000	0	Μ	lonthly	mortga	age or rent p	ayment	t:	\$30	0			
Other Real Estate: Address	Ту	/pe	Ye Acqu			arket alue		Mort Bala		Mortgage Holder		onthly ment		onthl Incor	•		
Other Notes Payabl	e Cre	ditor	Date	e of Lo	an	M	laturi	ity	Cur	rent Balance		Month	ly Pay	ment	t		