



**COMMERCIAL RETAIL ADVISORS, LLC**

# **Commercial Retail Advisors, LLC**

## **TENANT APPLICATION**

NAME \_\_\_\_\_

PROJECT \_\_\_\_\_

DATE \_\_\_\_\_

**PERSONAL FINANCIAL STATEMENT**

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 \_\_\_\_\_ ZIP \_\_\_\_\_  
 SOCIAL SECURITY HOME \_\_\_\_\_  
 NUMBER \_\_\_\_\_ PHONE \_\_\_\_\_  
 BIRTH DATE \_\_\_\_\_ NO. OF DEPENDENTS \_\_\_\_\_

DATE \_\_\_\_\_  
 EMPLOYER \_\_\_\_\_ YEARS \_\_\_\_\_  
 POSITION \_\_\_\_\_ PHONE \_\_\_\_\_  
 PREVIOUS EMPLOYER \_\_\_\_\_ YEARS \_\_\_\_\_  
 NAME OF SPOUSE \_\_\_\_\_  
 SPOUSE SOCIAL SECURITY NO. \_\_\_\_\_

**IMPORTANT NOTICE:** Under Arizona Law, property (including salary and wages) acquired by either a husband or wife during marriage is the community property of both, property acquired before marriage or after marriage by gift or inheritance and the income therefrom is the separate property of the spouse who acquired it.

Community Obligation: This Financial Statement, UNLESS OTHERWISE MARKED BELOW, is our joint Financial Statement in conjunction with a request for credit as a debt of the marital community. Supply all information requested (both spouses sign the Financial Statement).

Sole and Separate Obligation: This Financial Statement, is my SOLE AND SEPARATE Financial Statement, in conjunction with a request of credit as a sole and separate debt of mine, not based on the creditworthiness of the marital community (if any). Give no other information regarding your spouse or co-applicant (if any) except name. (List all your sole and separate assets and income and also all debts for which you are obligated by your signed promise to pay.)

ASSETS		DOLLARS	LIABILITIES		DOLLARS
Cash	Bank Name		Loans payable	Branch Name(s) & collateral	
1)			1)		
2)			2)		
Other cash - give location (s)			3)		
1)			Loans payable to other financial institutions	give name(s) & collateral	
2)			1)		
3)			2)		
Amounts owed to you/Loans payable to you			3)		
(give names)			Accounts payable (include credit card(s) to other firms and	individuals give name (s)	
1)			1)		
2)			2)		
3)			3)		
4)					
Securities (Schedule B)			Taxes payable		
Cash surrender value life insurance (Schedule C)			Estimated taxes on unrealized gains		
Vehicles - year and make			Real estate indebtedness (Schedule A)		
1)			Other liabilities (describe)		
2)			1)		
Real estate (Schedule A)			2)		
Other assets (describe)			3)		
1)			4)		
2)			5)		
3)			<b>TOTAL LIABILITIES</b>		\$
4)			<b>NET WORTH</b>		\$
5)			<b>TOTAL ASSETS</b>		\$
		\$	<b>TOTAL</b>		\$
<b>ANNUAL INCOME*</b>			<b>ANNUAL EXPENDITURES (excluding ordinary living expenses)</b>		
Gross salary			Real estate payment(s) (Schedule A)		
Spouse gross salary			Rent		
Securities income			Income taxes (annual payroll deductions or lump sum payment)		
Rental income			All insurance premiums (Ins. & R.E.. Taxes - not impounded**)		
Other income (describe)			Property taxes (if not "impounded")		
1)			Other expenditures (describe) include payments for vehicles)		
2)			1)		
3)			2)		
4)			3)		
5)			4)		
			5)		
<b>TOTAL ANNUAL INCOME</b>		\$	<b>TOTAL ANNUAL EXPENDITURES</b>		\$
LESS - TOTAL EXPENDITURES		\$			
<b>NET CASH INCOME</b>		\$	**Impounded insurance premiums and property taxes are amounts held in escrow by the lender for future payments.		
(exclusive of ordinary living expenses)					

\*Income from alimony, child support, or maintenance payments need not be revealed if you do not choose to disclose such income in applying for credit. As a creditor, we may inquire whether any income stated in an application is derived from such a source.

**CHECK ALL APPLICABLE ITEMS AND GIVE DETAILS (i.e., names, dates and descriptions)**

\_\_\_\_ Assets held in joint tenancy - With whom: \_\_\_\_\_

\_\_\_\_ Assets held in Trust - Name of Trust: \_\_\_\_\_

\_\_\_\_ Debts of other which you guarantee: \_\_\_\_\_

\_\_\_\_ Assets encumbered except as indicated: \_\_\_\_\_

\_\_\_\_ Debt secured except as indicated: \_\_\_\_\_

\_\_\_\_ Other business connections: \_\_\_\_\_

\_\_\_\_ Suits or judgements against you: \_\_\_\_\_

\_\_\_\_ Bankruptcy - Year: \_\_\_\_\_

\_\_\_\_ Executor of your estate: \_\_\_\_\_

\_\_\_\_ Other banks with which you do business: \_\_\_\_\_

**SCHEDULE A - REAL ESTATE**

ADDRESS AND DESCRIPTION OF PROPERTY	TITLE IN NAME OF	PURCHASE PRICE	YEAR PURCHASED	ESTIMATED VALUE	INDEBTEDNESSES	ANNUAL PAYMENTS	TO WHOM PAYABLE
1.		\$		\$	\$	\$	
2.							
3.							
4.							

**SCHEDULE B - SECURITIES**

NUMBER SHARES OF STOCK/ FACE VALUE OF BONDS	DESCRIPTION - NAME OF COMPANY	EXCHANGE ON WHICH TRADED (IF KNOWN)	CURRENT VALUE - MARKETABLE	ESTIMATED VALUE - UNMARKETABLE
1.			\$	\$
2.				
3.				
4.				

**SCHEDULE C - LIFE INSURANCE**

NAME OF INSURED	NAME OF COMPANY	FACE VALUE	CASH SURRENDER VALUE (IF ANY)	BENEFICIARY
1.		\$	\$	
2.				
3.				
4.				

Automobile insurance: Public Liability - Yes  No  Property Damage - Yes  No  Comprehensive Personal Liability - Yes  No  \$ \_\_\_\_\_

If additional space is needed for Schedule A, Schedule B, and/or Schedule C, list on separate sheet and attached.

In submitting the foregoing statement, both the printed and written portions of which I (we) have carefully read, I (we) guarantee its accuracy with the intent that it be relied upon by Commercial Retail Advisors, LLC or its clients. I (we) warrant that I (we) have no known obligations, direct or contingent, which have not been set forth hereon and that I have not knowingly withheld any material information of an adverse nature. I (we) agree to notify Commercial Retail Advisors, LLC immediately in writing, of any unfavorable change in my financial condition. I (we) hereby authorize Commercial Retail Advisors, LLC or its clients to conduct a credit check and/or background check to provide additional information as to our credit risk.

\_\_\_\_\_  
(Date Signed) \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date Signed) \_\_\_\_\_  
(Signature)



b. Name of Center: \_\_\_\_\_  
 Location: \_\_\_\_\_  
 Street City State Zip  
 Sales History: 1999 \$ \_\_\_\_\_, 2000 \$ \_\_\_\_\_, 2001 \$ \_\_\_\_\_  
 Landlord: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Phone: (\_\_\_\_) \_\_\_\_\_ Store Open Since: \_\_\_\_\_

c. Name of Center: \_\_\_\_\_  
 Location: \_\_\_\_\_  
 Street City State Zip  
 Sales History: 1999 \$ \_\_\_\_\_, 2000 \$ \_\_\_\_\_, 2001 \$ \_\_\_\_\_  
 Landlord: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Phone: (\_\_\_\_) \_\_\_\_\_ Store Open Since: \_\_\_\_\_

11. Anticipated Date to Occupy Store \_\_\_\_\_ Opening Date \_\_\_\_\_ Hours \_\_\_\_\_ AM to \_\_\_\_\_ PM

12. Store to be Managed By: \_\_\_\_\_  
 Last First Middle

How many hours per week will owners be involved: \_\_\_\_\_ hours Days per week store to be open \_\_\_\_\_

13. Tenant has been operating under the store name for \_\_\_\_\_ years in this community and for \_\_\_\_\_ years in \_\_\_\_\_

14. Tenant shall use the premises to sell: \_\_\_\_\_

15. Products/Merchandise to be carried: \_\_\_\_\_

Principal Suppliers of Merchandise:

Company/Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

Street City State Zip

Phone: (\_\_\_\_) \_\_\_\_\_

Company/Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

Street City State Zip

Phone: (\_\_\_\_) \_\_\_\_\_

Company/Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

Street City State Zip

Phone: (\_\_\_\_) \_\_\_\_\_

16. List your principal business activities for the past five years. Include any prior retail experience of the owners/manager for the operation of this store: \_\_\_\_\_

Company \_\_\_\_\_ Address \_\_\_\_\_

Type of Business \_\_\_\_\_

Employee From \_\_\_\_\_ To \_\_\_\_\_

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

Supervisor \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_

Describe Duties, Responsibilities and Number of Employees Supervised: \_\_\_\_\_

Company \_\_\_\_\_ Address \_\_\_\_\_

Type of Business \_\_\_\_\_

Employee From \_\_\_\_\_ To \_\_\_\_\_

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

Supervisor \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_

Describe Duties, Responsibilities and Number of Employees Supervised: \_\_\_\_\_



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I (we) hereby attest that all of the information on this application and accompanying Personal Financial Statement is true and correct. This information has been given to you for the purpose of inducing Commercial Retail Advisors' clients to rent to me (us) in your shopping center. I (we) authorize such investigation and receiving of information requested by Commercial Retail Advisors, LLC, or its clients, and release from liability any person/entity giving or receiving such information.

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Signature

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Date

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Signature

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Date