

## 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;

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

Page 4: Trade References (orange) – 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.



**Regional Micro-Enterprise Credential  
Resource 06-09**



My fictional name is:		Robin Smith						
<b>Page 1: Personal Information</b>								
Birthdate:		12/15/1990		Social Security Number:		441-41-4141		
Home Street Address:		98 Walnut Drive						
City, State and Zip:		Acres, LA 70777			Years at current address:		2	
Home Phone Number:		318.555.4545		Cellphone Number:		504.555.5252		
Do I have a driver's license?		Yes	<input checked="" type="checkbox"/>	License No:		864 454 321	No	
Current Employer:		Quality Car Service and Repair			Position:		Owner-Mechanic	
Nature of Business:		Automobile service facility				Years of Service		8
Street Address		100 World Way						
City, State and Zip:		Harmony, LA 77088						
Main Phone Number:		318.555.1000			Fax Number:		318.555.1001	
Personal Bank		Bank of America			Bank Contact		Jamie Fields	
Street Address		100 Corporate Drive						
City, State and Zip:		Acres, LA 70777			Phone		318.555.6060	
Checking Account Number		95-584458584			Current Balance		\$11,000	
Savings Account Number		none			Current Balance			
Other Account Number		none			Current Balance			
Personal Brokerage		Charles Schwab			Main Acct No:		AB-62-884488	
Street Address		115 Corporate Drive						
City, State and Zip:		Acres, LA 70777			Phone		318.555.9034	
Stock Holdings	Company:		Procter & Gamble	No. of Shares		100	Value	\$8,000
	Company:		Google	No. of Shares		50	Value	\$15,000
	Company:		Mutual Funds	No. of Shares		100	Value	\$10,000



**Regional Micro-Enterprise Credential  
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My fictional name is:		Robin Smith					
<b>Page 2: Financial Profile</b>							
My monthly salary:	\$5,500	Monthly Bonus/Commission	none	Annual Bonus/Commission	\$10,000		
Do I own or rent where I live?	Own	✓			Rent		
If I own a house, how much is it worth?		\$250,000					
How much is the mortgage on my house?		\$200,000	Monthly mortgage or rent payment:			\$900	
Other Real Estate: Address	Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income
None							
Other Notes Payable	Creditor	Date of Loan	Maturity	Current Balance		Monthly Payment	
Car Loan	Enterprise	12/15/2015	12/15/2019	\$20,000		\$500	
Credit Card Balance	Chase			\$3,000		\$300	
Other Assets Owned		Dollar Value	Other Annual Income			Dollar Value	
Vehicles		\$25,000	Spouse salary/wages/bonuses /commissions			\$0	
Household and Personal Items		\$5,000	Alimony or child support your receive			\$0	
All Other Assets			All other income (including dividends)			\$800	
Annual or Monthly Expenditures (not included above)				Monthly		Annual	
Insurance: Housing						\$1,000	
Maintenance and Taxes: Housing						\$4,000	
Utilities (Electric, Gas, Water, Sanitation, Cable, Internet)				\$250			
Telephone (landline, cellphone)				\$200			
Healthcare (doctor, dentist, prescriptions, other)						\$1,000	
Groceries				\$600			
Clothing						\$1,000	
Vehicle Costs (gas, insurance, maintenance, taxes)				\$500			
Entertainment Costs (dining out, vacations, other)						\$1,800	
Insurance: Other (life, medical, other)						\$1,000	
Pets							
Gifts						\$2,000	
All Other Expenses						\$500	



My fictional name is:		Robin Smith						
<b>Page 3: Business Information</b>								
Company Name:		Quality Car Service and Repair			Date Established		Dec 15, 2011	
Nature of Business:		Automobile service facility						
Type of Business:		Corporation	Sole Proprietorship	LLC (Limited Liability Corp)	<input checked="" type="checkbox"/>	Partnership	Other	
Street Address		100 World Way						
City, State and Zip:		Harmony, LA 77088			Years at current address:		4	
Main Phone Number:		318.555.1000			Fax Number:		318.555.1001	
Email:		<a href="mailto:info@qualitycar.com">info@qualitycar.com</a>			Website:		www.qualitycar.com	
Name of Owner / Shareholder				Title or "Not Active"		% Ownership		
Robin Smith				President		80%		
Blair Smith				Not Active		20%		
<b>Financial Results / Projections</b>			<b>Actual</b>	<input checked="" type="checkbox"/>	<b>Projections</b>			
Annual or Monthly Revenues (not included above)				Monthly		Annual		
Service Revenues				\$24,000				
Merchandise Revenues				\$8,000				
Other Revenues						\$20,000		
Average Transactions per Month				200				
Annual or Monthly Expenditures				Monthly		Annual		
Cost of Goods Sold				\$4,000				
Salaries and Wages				\$14,000				
Rent and Utilities				\$3,500				
Insurance				\$1,500				
Debt Service				\$1,000				
Advertising						\$6,000		
Outside Services (accountants, lawyers)						\$12,000		
Maintenance Costs (facility, equipment)						\$20,000		
All Other Expenses						\$6,000		
Assets		Current Value		Liabilities		Current Value		
Inventory		\$40,000		Line of Credit: Amount Requested		\$40,000		
Equipment (including owned vehicles)		\$80,000		Equipment-related Debt (current equipment)		\$20,000		
Accounts Receivable (payments due from customers)		\$10,000		Accounts Payable (payments due to suppliers)		\$24,000		



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All Other Assets		\$20,000	All Other Liabilities		\$10,000
My fictional name is:		Robin Smith			
<b>Page 4: Trade References</b>					
Company Name	Bolt Parts			Contact	J Bolt
Business Relationship	Supplier				
Street Address	200 World Way				
City, State and Zip:	Harmony, LA 77088	Phone	318.555.3212		
Email	jbolt@boltparts.com				
Company Name	Lisa Bookkeeping			Contact	Blair Lisa
Business Relationship	Bookkeeping Services				
Street Address	100 Corporate Way				
City, State and Zip:	Harmony, LA 77638	Phone	318.555.4469		
Email	bestbookkeepers@lisa.com				
Company Name	Effective Marketing, Inc.			Contact	Casey Forte
Business Relationship	Direct Mailing Advertising Company				
Street Address	200 Corporate Way				
City, State and Zip:	Harmony, LA 77638	Phone	318.555.1123		
Email	casey@effectivemarketing.com				



**Regional Micro-Enterprise Credential  
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My fictional name is:		Amari Jones						
<b>Page 1: Personal Information</b>								
Birthdate:		12/15/1985		Social Security Number:		551-51-5151		
Home Street Address:		90 Pine Street						
City, State and Zip:		Forest, LA 70666			Years at current address:		10	
Home Phone Number:		318.555.6868		Cellphone Number:		225.555.3434		
Do I have a driver's license?		Yes	<input checked="" type="checkbox"/>	License No:		983 287 139	No	
Current Employer:		Jones and Felder, LLC			Key Contact:		Dylan Felder	
Nature of Business:		Accountants				Years of Service		12
Street Address		300 World Way						
City, State and Zip:		Harmony, LA 77088						
Main Phone Number:		318.555.5467			Fax Number:		318.555.5468	
Personal Bank		National Bank			Bank Contact		Cody Frank	
Street Address		100 Division Drive						
City, State and Zip:		Forest, LA 70623			Phone		318.555.0404	
Checking Account Number		98-893-30093			Current Balance		\$24,000	
Savings Account Number		none			Current Balance			
Other Account Number		none			Current Balance			
Personal Brokerage		Fidelity			Main Acct No:		SP-555-643487	
Street Address		115 Division Drive						
City, State and Zip:		Forest, LA 70623			Phone		318.555.8913	
Stock Holdings	Company:		IBM	No. of Shares		100	Value	\$13,000
	Company:		Apple	No. of Shares		100	Value	\$12,000
	Company:		Mutual Funds	No. of Shares		200	Value	\$30,000



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My fictional name is:		Amari Jones					
<b>Page 2: Financial Profile</b>							
My monthly salary:	\$6,250	Monthly Bonus/Commission	none	Annual Bonus/Commission	\$2,000		
Do I own or rent where I live?	Own	✓			Rent		
If I own a house, how much is it worth?		\$280,000					
How much is the mortgage on my house?		\$200,000	Monthly mortgage or rent payment:			\$900	
Other Real Estate: Address	Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income
None							
Other Notes Payable	Creditor	Date of Loan	Maturity	Current Balance		Monthly Payment	
Car Loan	Enterprise	12/15/2012	12/15/2016	\$20,000		\$700	
Credit Card Balance	Capital One			\$0			
Other Assets Owned		Dollar Value	Other Annual Income			Dollar Value	
Vehicles		\$30,000	Spouse salary/wages/bonuses /commissions			\$0	
Household and Personal Items		\$10,000	Alimony or child support your receive			\$0	
All Other Assets			All other income (including dividends)			\$2,000	
Annual or Monthly Expenditures (not included above)				Monthly		Annual	
Insurance: Housing						\$1,000	
Maintenance and Taxes: Housing						\$3,000	
Utilities (Electric, Gas, Water, Sanitation, Cable, Internet)				\$250			
Telephone (landline, cellphone)				\$200			
Healthcare (doctor, dentist, prescriptions, other)						\$1,000	
Groceries				\$600			
Clothing						\$1,000	
Vehicle Costs (gas, insurance, maintenance, taxes)				\$500			
Entertainment Costs (dining out, vacations, other)						\$4,000	
Insurance: Other (life, medical, other)						\$1,000	
Pets							
Gifts						\$2,000	
All Other Expenses						\$1,000	



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My fictional name is:		Amari Jones						
<b>Page 3: Business Information</b>								
Company Name:		Jones and Felder, LLC			Date Established		Dec 15, 2008	
Nature of Business:		Accountants						
Type of Business:		Corporation	Sole Proprietorship	LLC (Limited Liability Corp)	<input checked="" type="checkbox"/>	Partnership	Other	
Street Address		300 World Way						
City, State and Zip:		Harmony, LA 77088			Years at current address:		4	
Main Phone Number:		318.555.5467			Fax Number:		318.555.5468	
Email:	info@jonesandfelderllc.com			Website:	www.jonesandfelderaccountants.com			
Name of Owner / Shareholder				Title or "Not Active"		% Ownership		
Amari Jones				Senior Partner		50%		
Dylan Felder				Senior Partner		50%		
<b>Financial Results / Projections</b>		<b>Actual</b>		✓		<b>Projections</b>		
Annual or Monthly Revenues (not included above)				Monthly		Annual		
Service Revenues				\$30,000				
Merchandise Revenues								
Other Revenues						\$12,000		
Average Transactions per Month				50				
Annual or Monthly Expenditures				Monthly		Annual		
Cost of Goods Sold								
Salaries and Wages						\$210,000		
Rent and Utilities				\$3,500				
Insurance				\$1,500				
Debt Service								
Advertising				\$1,000				
Outside Services (accountants, lawyers)						\$4,000		
Maintenance Costs (facility, equipment)						\$3,000		
All Other Expenses				\$1,500				
Assets		Current Value		Liabilities		Current Value		
Inventory		\$0		Line of Credit: Amount Requested		\$40,000		
Equipment (including owned vehicles)		\$30,000		Equipment-related Debt		\$5,000		
Accounts Receivable (payments due from customers)		\$30,000		Accounts Payable (payments due to suppliers)		\$6,000		





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All Other Assets		\$10,000	All Other Liabilities		\$6,000
My fictional name is:		<a href="#">Amari Jones</a>			
<b>Page 4: Trade References</b>					
Company Name	Lightning Temporary Services		Contact	Devon Lightning	
Business Relationship	Temp Service for Bookkeepers				
Street Address	600 World Way				
City, State and Zip:	Harmony, LA 77088		Phone	318.555.2908	
Email	<a href="mailto:dlightning@lts.com">dlightning@lts.com</a>				
Company Name	System Support Partners		Contact	Blake Felder	
Business Relationship	Computer Services				
Street Address	900 Corporate Way				
City, State and Zip:	Harmony, LA 77638		Phone	318.555.8018	
Email	<a href="mailto:blake@cs.com">blake@cs.com</a>				
Company Name	Effective Marketing, Inc.		Contact	Casey Forte	
Business Relationship	Direct Mailing Advertising Company				
Street Address	200 Corporate Way				
City, State and Zip:	Harmony, LA 77638		Phone	318.555.1123	
Email	<a href="mailto:casey@effectivemarketing.com">casey@effectivemarketing.com</a>				



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My fictional name is:		Jamie Ford					
<b>Page 1: Personal Information</b>							
Birthdate:		12/15/1995		Social Security Number:		321-71-7811	
Home Street Address:		99 Cherry Lane					
City, State and Zip:		Seaside, LA 70777			Years at current address:		1
Home Phone Number:		318.555.1616		Cellphone Number:		225.535.1617	
Do I have a driver's license?		Yes	<input checked="" type="checkbox"/>	License No:		546 897 213	No
Current Employer:		Welcome Inn Restaurant			Position:		Assistant Manager
Nature of Business:		Food Service			Years of Service		8
Street Address		333 Welcome Road					
City, State and Zip:		Harmony, LA 77444					
Main Phone Number:		318.555.0953			Fax Number:		
Personal Bank		Chase			Bank Contact		Harley Hamilton
Street Address		180 Corporate Drive					
City, State and Zip:		Acres, LA 70777			Phone		318.555.7812
Checking Account Number		15-453-098163			Current Balance		\$1,000
Savings Account Number		none			Current Balance		
Other Account Number		none			Current Balance		
Personal Brokerage		none			Main Acct No:		
Street Address							
City, State and Zip:					Phone		
Stock Holdings	Company:				No. of Shares		Value
	Company:				No. of Shares		Value
	Company:				No. of Shares		Value



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My fictional name is:		Jamie Ford					
<b>Page 2: Financial Profile</b>							
My monthly salary:	\$3,000	Monthly Bonus/Commission	none	Annual Bonus/Commission	\$0		
Do I own or rent where I live?	Own	Rent			✓		
If I own a house, how much is it worth?							
How much is the mortgage on my house?			Monthly mortgage or rent payment:			\$800	
Other Real Estate: Address	Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income
Other Notes Payable	Creditor	Date of Loan	Maturity	Current Balance		Monthly Payment	
Other Assets Owned		Dollar Value	Other Annual Income			Dollar Value	
Vehicles		\$5,000	Spouse salary/wages/bonuses /commissions			\$0	
Household and Personal Items		\$3,000	Alimony or child support your receive			\$0	
All Other Assets			All other income (including dividends)			\$8,000	
Annual or Monthly Expenditures (not included above)				Monthly		Annual	
Insurance: Housing							
Maintenance and Taxes: Housing							
Utilities (Electric, Gas, Water, Sanitation, Cable, Internet)				\$150			
Telephone (landline, cellphone)				\$150			
Healthcare (doctor, dentist, prescriptions, other)						\$2,000	
Groceries				\$400			
Clothing						\$500	
Vehicle Costs (gas, insurance, maintenance, taxes)				\$300			
Entertainment Costs (dining out, vacations, other)						\$2,000	
Insurance: Other (life, medical, other)						\$1,000	
Pets						\$500	
Gifts						\$1,000	
All Other Expenses						\$1,000	



My fictional name is:		Jamie Ford								
<b>Page 3: Business Information</b>										
Company Name:	Family Restaurant				Date Established	plan: next quarter				
Nature of Business:	Local restaurant (breakfast and lunch)									
Type of Business:	Corporation		Sole Proprietorship		LLC (Limited Liability Corp)	<input checked="" type="checkbox"/>	Partnership		Other	
Street Address		550 World Way								
City, State and Zip:		Harmony, LA 77088			Years at current address:	4				
Main Phone Number:		318.555.4938			Fax Number:	none				
Email:	<a href="mailto:jamieford12@gmail.com">jamieford12@gmail.com</a>				Website:	none				
Name of Owner / Shareholder				Title or "Not Active"		% Ownership				
Jamie Ford				Owner		100%				
<b>Financial Results / Projections</b>			<b>Actual</b>		<b>Projections</b>		✓			
Annual or Monthly Revenues (not included above)				Monthly		Annual				
Service Revenues										
Merchandise Revenues				\$35,000						
Other Revenues				\$1,000						
Average Transactions per Month				500						
Annual or Monthly Expenditures				Monthly		Annual				
Cost of Goods Sold				38% of revenues						
Salaries and Wages				33% of revenues						
Rent and Utilities				\$3,500						
Insurance				\$1,500						
Debt Service				\$800						
Advertising				\$1,000						
Outside Services (accountants, lawyers)				\$1,000						
Maintenance Costs (facility, equipment)				\$1,500						
All Other Expenses				\$2,000						
Assets		Current Value		Liabilities		Current Value				
Inventory		\$10,000		Lines of Credit: Amounts Borrowed		\$40,000				
Equipment (including owned vehicles)		\$25,000		Equipment-related Debt		\$0				
Accounts Receivable (payments due from customers)				Accounts Payable (payments due to suppliers)		\$6,000				



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All Other Assets		\$5,000	All Other Liabilities		\$4,000
My fictional name is:		Jamie Ford			
<b>Page 4: Trade References</b>					
Company Name	Sudden Restaurant Supplies		Contact	Sammie Sudden	
Business Relationship	Supplier				
Street Address	5500 World Way				
City, State and Zip:	Harmony, LA 77099	Phone	318.555.8798		
Email	sammie@sudden.com				
Company Name	Lisa Bookkeeping		Contact	Blair Lisa	
Business Relationship	Bookkeeping Services				
Street Address	100 Corporate Way				
City, State and Zip:	Harmony, LA 77638	Phone	318.555.4469		
Email	bestbookkeepers@lisa.com				
Company Name	Effective Marketing, Inc.		Contact	Casey Forte	
Business Relationship	Direct Mailing Advertising Company				
Street Address	200 Corporate Way				
City, State and Zip:	Harmony, LA 77638	Phone	318.555.1123		
Email	casey@effectivemarketing.com				



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My fictional name is:	Blake Felder										
<b>Page 1: Personal Information</b>											
Birthdate:	12/15/1992			Social Security Number:	323-98-9810						
Home Street Address:	44 Elm Street										
City, State and Zip:	Acres, LA 70777					Years at current address:	3				
Home Phone Number:					Cellphone Number:	318.500.2301					
Do I have a driver's license?	Yes	<input checked="" type="checkbox"/>	License No:	111 230 888				No			
Current Employer:	Computer Consultants, Inc.				Position:	Consultant					
Nature of Business:	Computer Consulting					Years of Service	6				
Street Address	525 Consultants Way										
City, State and Zip:	Harmony, LA 77501										
Personal Bank	Friendly Neighborhood Bank				Bank Contact	Marley Friendly					
Street Address	1201 Corporate Drive										
City, State and Zip:	Acres, LA 70755				Phone	318.555.1299					
Checking Account Number	120-8254-36254				Current Balance	\$3,000					
Savings Account Number	none				Current Balance						
Other Account Number	none				Current Balance						
Personal Brokerage					Main Acct No:						
Street Address											
City, State and Zip:					Phone						
Stock Holdings	Company:				No. of Shares			Value			
	Company:				No. of Shares			Value			
	Company:				No. of Shares			Value			



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My fictional name is:		Blake Felder					
<b>Page 2: Financial Profile</b>							
My monthly salary:	\$6,000	Monthly Bonus/Commission	none	Annual Bonus/Commission	none		
Do I own or rent where I live?	Own	Rent			✓		
If I own a house, how much is it worth?							
How much is the mortgage on my house?			Monthly mortgage or rent payment:			\$600	
Other Real Estate: Address	Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income
None							
Other Notes Payable	Creditor	Date of Loan	Maturity	Current Balance		Monthly Payment	
Credit Card Balance	Chase			\$3,000		\$300	
Other Assets Owned		Dollar Value	Other Annual Income			Dollar Value	
Vehicles		\$20,000	Spouse salary/wages/bonuses /commissions			\$0	
Household and Personal Items		\$5,000	Alimony or child support your receive			\$0	
All Other Assets			All other income (including dividends)			\$0	
Annual or Monthly Expenditures (not included above)				Monthly		Annual	
Insurance: Housing						\$250	
Maintenance and Taxes: Housing							
Utilities (Electric, Gas, Water, Sanitation, Cable, Internet)				\$200			
Telephone (landline, cellphone)				\$250			
Healthcare (doctor, dentist, prescriptions, other)						\$1,000	
Groceries				\$600			
Clothing						\$3,000	
Vehicle Costs (gas, insurance, maintenance, taxes)				\$500			
Entertainment Costs (dining out, vacations, other)				\$200			
Insurance: Other (life, medical, other)						\$1,000	
Pets						\$1,000	
Gifts						\$2,000	
All Other Expenses						\$1,000	



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My fictional name is:		Blake Felder					
<b>Page 3: Business Information</b>							
Company Name:	System Support Services				Date Established	plan: next quarter	
Nature of Business:	Computer Support Services for Small Businesses and Affluent Families						
Type of Business:	Corporation		Sole Proprietorship		LLC (Limited Liability Corp)	<input checked="" type="checkbox"/>	Partnership
							Other
Street Address		44 Elm Street					
City, State and Zip:		Acres, LA 70777			Years at current address:	(home)	
Main Phone Number:		318.500.2301			Fax Number:		
Email:	<a href="mailto:team@systemsupportservices.com">team@systemsupportservices.com</a>				Website:	<a href="http://www.systemsupportservices.com">www.systemsupportservices.com</a>	
Name of Owner / Shareholder				Title or "Not Active"		% Ownership	
Blake Felder				President		100%	
<b>Financial Results / Projections</b>		<b>Actual</b>		<b>Projections</b>		<input checked="" type="checkbox"/>	
Annual or Monthly Revenues (not included above)				Monthly		Annual	
Service Revenues				\$25,000			
Merchandise Revenues				\$5,000			
Other Revenues				\$2,000			
Average Transactions per Month				30			
Annual or Monthly Expenditures				Monthly		Annual	
Cost of Goods Sold				65% of merchandise			
Salaries and Wages				\$15,000			
Rent and Utilities							
Insurance				\$1,500			
Debt Service				\$800			
Advertising				\$2,000			
Outside Services (accountants, lawyers)						\$6,000	
Maintenance Costs (facility, equipment)						\$1,000	
All Other Expenses						\$2,000	
Assets		Current Value		Liabilities		Current Value	
Inventory		\$5,000		Line of Credit: Amount Requested		\$40,000	
Equipment (including owned vehicles)		\$25,000		Equipment-related Debt			
Accounts Receivable (payments due from customers)		\$25,000		Accounts Payable (payments due to suppliers)		\$6,000	





**Regional Micro-Enterprise Credential  
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All Other Assets		\$5,000	All Other Liabilities		\$3,000
My fictional name is:		Blake Felder			
<b>Page 4: Trade References</b>					
Company Name	Crunch Computers			Contact	Kelly Krunch
Business Relationship	Supplier				
Street Address	12 World Way				
City, State and Zip:	Harmony, LA 77011	Phone	318.555.0080		
Email	kkrunch@crunch.com				
Company Name	Lisa Bookkeeping			Contact	Blair Lisa
Business Relationship	Bookkeeping Services				
Street Address	100 Corporate Way				
City, State and Zip:	Harmony, LA 77638	Phone	318.555.4469		
Email	bestbookkeepers@lisa.com				
Company Name	Effective Marketing, Inc.			Contact	Casey Forte
Business Relationship	Direct Mailing Advertising Company				
Street Address	200 Corporate Way				
City, State and Zip:	Harmony, LA 77638	Phone	318.555.1123		
Email	casey@effectivemarketing.com				



**Regional Micro-Enterprise Credential  
Resource 06-09**



Guarantor Name		Logan Lane							
Birthdate:		12/15/55		Social Security Number:		132-98-0002			
Home Street Address:		44 Beech Grove							
City, State and Zip:		Freedom, LA 70011			Years at current address:		30		
Home Phone Number:		225.555.4001		Cellphone Number:		318.555.6226			
Do I have a driver's license?		Yes	<input checked="" type="checkbox"/>	License No:		763 003 330			
No									
Personal Bank		Bank of America			Bank Contact		Terry Pointer		
Street Address		4646 Pointer Place							
City, State and Zip:		Alexander, LA 79911			Phone		318.555.0129		
Checking Account Number		95-584458584			Current Balance		\$80,000		
Savings Account Number		91-484203831			Current Balance		\$250,000		
Other Account Number		89-647363847 (IRA account)			Current Balance		\$2,000,000		
Personal Brokerage		Fidelity			Main Acct No:		32-138-09302		
Street Address		2424 Battalion Circle							
City, State and Zip:		Fort, LA 73913			Phone		318.555.0404		
Stock Holdings		Company:		Procter & Gamble		No. of Shares	5,000	Value	\$400,000
		Company:		Apple		No. of Shares	10,000	Value	\$1,000,000
		Company:		Mutual Funds		No. of Shares	10,000	Value	\$3,000,000
Annual Compensation (all sources)			\$500,000		All Other Annual Income (all sources)			\$250,000	
Position / Employer		CEO of Freedom Real Estate							
Do I own or rent where I live?		Own		<input checked="" type="checkbox"/>		Rent			
If I own a house, how much is it worth?				\$1,000,000					
How much is the mortgage on my house?			Monthly mortgage or rent payment:			\$0			
Other Real Estate: Address		Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income	
Eagle Office Park		Office Bldg	1985	\$2,000,000	\$1,000,000	Chase	\$5,000	\$30,000	
Other Notes Payable		Creditor	Date of Loan	Maturity	Current Balance		Monthly Payment		



**Regional Micro-Enterprise Credential  
Resource 06-09**



Guarantor Name		Kendall Hill							
Birthdate:		12/15/70		Social Security Number:		562-34-0111			
Home Street Address:		132 Willow Drive							
City, State and Zip:		Freedom, LA 70011			Years at current address:		10		
Home Phone Number:		225.555.6503		Cellphone Number:		504.555.6129			
Do I have a driver's license?		Yes	<input checked="" type="checkbox"/>	License No:		673 030 355	No		
Personal Bank		Bank of America			Bank Contact		Terry Pointer		
Street Address		4646 Pointer Place							
City, State and Zip:		Alexander, LA 79911			Phone		318.555.0129		
Checking Account Number		95-001939485			Current Balance		\$30,000		
Savings Account Number					Current Balance				
Other Account Number		89-201903934 (IRA account)			Current Balance		\$200,000		
Personal Brokerage		Schwab			Main Acct No:		YY-98-839283		
Street Address		101 Battalion Circle							
City, State and Zip:		Fort, LA 73921			Phone		318.555.9120		
Stock Holdings		Company:		Mutual Funds		No. of Shares	500	Value	\$300,000
		Company:				No. of Shares		Value	
		Company:				No. of Shares		Value	
Annual Compensation (all sources)			\$90,000		All Other Annual Income (all sources)			\$10,000	
Position / Employer		Chief Financial Officer (CFO), Liberty Electronics							
Do I own or rent where I live?		Own		<input checked="" type="checkbox"/>		Rent			
If I own a house, how much is it worth?				\$500,000					
How much is the mortgage on my house?		\$350,000		Monthly mortgage or rent payment:			\$1,600		
Other Real Estate Address		Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income	
Other Notes Payable		Creditor		Date of Loan	Maturity	Current Balance		Monthly Payment	
Vehicle Loan		GMAC		12/15/15	12/15/20	\$80,000		\$1,500	
Home Improvement Loan		Bank of America		12/15/11	12/15/21	\$100,000		\$1,400	



**Regional Micro-Enterprise Credential  
Resource 06-09**



Guarantor Name		Quinn Thomas							
Birthdate:		12/15/90		Social Security Number:		985-10-0102			
Home Street Address:		88 Evergreen Lane							
City, State and Zip:		Freedom, LA 70055			Years at current address:		3		
Home Phone Number:		225.555.8893		Cellphone Number:		504.555.9930			
Do I have a driver's license?		Yes	<input checked="" type="checkbox"/>	License No:		847 387 784			
No		<input type="checkbox"/>							
Personal Bank		Bank of America			Bank Contact		Terry Pointer		
Street Address		4646 Pointer Place							
City, State and Zip:		Alexander, LA 79911			Phone		318.555.0129		
Checking Account Number		95-584458584			Current Balance		\$20,000		
Savings Account Number					Current Balance				
Other Account Number		88-243947644 (IRA account)			Current Balance		\$20,000		
Personal Brokerage		Fidelity			Main Acct No:		45-455-60598		
Street Address		2424 Battalion Circle							
City, State and Zip:		Fort, LA 73913			Phone		318.555.0404		
Stock Holdings		Company:		Mutual Funds		No. of Shares	100	Value	\$10,000
		Company:				No. of Shares		Value	
		Company:				No. of Shares		Value	
Annual Compensation (all sources)			\$65,000		All Other Annual Income (all sources)			\$5,000	
Position / Employer		Manager, McDonalds (Freedom location)							
Do I own or rent where I live?		Own		<input type="checkbox"/>		Rent		<input checked="" type="checkbox"/>	
If I own a house, how much is it worth?									
How much is the mortgage on my house?					Monthly mortgage or rent payment:		\$1,200		
Other Real Estate Address		Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income	
Other Notes Payable		Creditor		Date of Loan	Maturity	Current Balance		Monthly Payment	
Vehicle Loan		BMW Financial		12/15/13	12/15/19	\$60,000		\$1,500	



**Regional Micro-Enterprise Credential  
Resource 06-09**



Guarantor Name	<b>Parker Carpenter</b>						
Birthdate:	12/15/55	Social Security Number:	776-28-4837				
Home Street Address:	98 Sapling Court						
City, State and Zip:	Freedom, LA 70014				Years at current address:	30	
Home Phone Number:	225.555.9011		Cellphone Number:	504.555.0918			
Do I have a driver's license?	Yes	<input checked="" type="checkbox"/>	License No:	546 213 090			No
Personal Bank	Bank of America			Bank Contact	Terry Pointer		
Street Address	4646 Pointer Place						
City, State and Zip:	Alexander, LA 79911				Phone	318.555.0129	
Checking Account Number	95-584458584			Current Balance	\$80,000		
Savings Account Number				Current Balance			
Other Account Number	86-847490838 (IRA account)			Current Balance	\$200,000		
Personal Brokerage				Main Acct No:			
Street Address							
City, State and Zip:					Phone		
Stock Holdings	Company:			No. of Shares		Value	
	Company:			No. of Shares		Value	
	Company:			No. of Shares		Value	
Annual Compensation (all sources)	\$56,000		All Other Annual Income (all sources)	\$0			
Position / Employer	Retired						
Do I own or rent where I live?	Own	<input checked="" type="checkbox"/>			Rent		
If I own a house, how much is it worth?	\$300,000						
How much is the mortgage on my house?	\$50,000		Monthly mortgage or rent payment:	\$300			
Other Real Estate: Address	Type	Year Acquired	Market Value	Mortgage Balance	Mortgage Holder	Monthly Payment	Monthly Net Income
Other Notes Payable	Creditor	Date of Loan	Maturity	Current Balance	Monthly Payment		