



WESTWOOD
FUNDING

Opening 101:

Gathering File Control Info

Business Name: _____

1. Industry?

2. State?

3. How much capital do you need and when?

4. Positions / Debt?

5. Offers?

6. Revenue?

7. Average daily balance?

8. Credit Score?

9. Bankruptcy / Defaults?

10. Do you own the business property? / Any property?

11. Estimated value / equity?

12. Preferred contact method?

- **SHARP AS A TACK**
- **ENTHUSIASTIC**
- **EXPERT IN YOUR FIELD**

Ask for financials when over 100k requested

- *Full Financials +*
- *AR Report*
- *AP Report*

Description / Notes:
