

# FUNDING PRE-QUAL QUESTIONNAIRE



Use this form for consultation. Ask your prospect these questions to know if they are a good fit. Make notes of the answers.

- 1 What type of business do you run? \_\_\_\_\_
- 2 How long have you been in business? \_\_\_\_\_
- 3 What is your worst trait? \_\_\_\_\_
- 4 Is this your only location, or do you have others? \_\_\_\_\_
- 5 How has business been this year compared to last year? \_\_\_\_\_
- 6 Are you doing at least \$5K, \$10K, or \$20K+ per month in revenue? \_\_\_\_\_
- 7 Is your revenue pretty steady month-to-month, or does it fluctuate? \_\_\_\_\_
- 8 Do you usually receive payments daily, weekly, or monthly? \_\_\_\_\_
- 9 Do you currently have access to any lines of credit or working capital? \_\_\_\_\_
- 10 Have you tried to get funding from a bank recently? \_\_\_\_\_
- 11 What made you start exploring funding options right now? \_\_\_\_\_
- 12 What would additional capital allow you to do in your business? \_\_\_\_\_
- 13 Are you looking for funding to solve a problem or to take advantage of an opportunity? \_\_\_\_\_
- 14 What's the ideal amount you'd like to access? \_\_\_\_\_
- 15 Do you have any open advances or current loans? \_\_\_\_\_
- 16 Have you had any recent NSF's or bounced payments? \_\_\_\_\_
- 17 Do you collect payments mostly by card, cash, or invoices? \_\_\_\_\_
- 18 If you were approved, how soon would you want to move forward? \_\_\_\_\_
- 19 Do you prefer a shorter-term solution or something long-term and flexible? \_\_\_\_\_
- 20 Great — based on what you shared, it sounds like you'd be a good fit to get pre-qualified. What would you like to do? I'll send you the link to the Bank Breezy portal — once you submit, the funding team takes over and walks you through everything.