

## **The Business Planning Group has a “Business Loan” affiliation with William Hoyle Financial, LLC**

Business loans are continuing to get more difficult to obtain. This is hampering business development, expansion and growth. Recognizing this ever-growing trend, we have established an affiliation with William Hoyle Financial LLC to address this need. William Hoyle, CPA is the principal; through his relationship to numerous lenders he has access to innovative funding programs.

As a CPA practitioner, William said that he “has seen the limitations placed on small business formation and growth due to strict requirements imposed by traditional lenders. Over the years, I helplessly watched as more and more of my business clients were unable to obtain bank financing. Wanting to assist, I launched William Hoyle Financial LLC. So now when the Bank says “NO”, we might be able to help.” Unable to meet the funding needs of their customers, banks often refer business to William. As a result, the business often obtains the funding they need and the bank retains their customer.

William’s lending partners and loan programs are as diverse as the business community he serves. Funding requests from 25k to 100s of millions are routinely evaluated. The approval rate is more than double that of the bank. Here is a sample of the products; there are numerous others. ■ Business Lines of Credit ■ Commercial Real Estate ■ Franchise Financing ■ Equipment Leasing ■ SBA Programs ■ Project Financing ■ Purchase Order and Trade Finance ■ Mergers and Acquisitions ■ Business Loans

### William Hoyle Financial LLC:

- We at BPG are pleased to endorse William Hoyle. We have worked with him on many cases for several years.
- William Hoyle is a long time Drake Software user.
- William is a CPA with 25 years of working for client’s best interest.
- William has a relationship with numerous lenders and can provide innovative funding solutions to meet most business needs.
- Any necessary fees are only charged upon successful loan approval and are fully disclosed early during the application process.
- All personal information is fully protected and will only be made available to lenders as necessary to gauge their interest and to obtain financing.
- William will use your information to identify one or more lenders who might be interested in funding your request. He will then contact you with potential funding details and discuss next steps.
- Use the “Short Form” for funding requests up to \$150K and the “Expanded Form” for larger requests (see attached).
- Referral partners are protected. Accounting professionals & tax preparers: No tax, accounting, or auditing services will be offered to your clients. They are your clients and will remain your clients. Their loyalty is enhanced as you provide solutions to their business funding needs.
- Referral partners may choose their level of participation. Choose to receive periodic updates, copied on every correspondence and email, or even conference called on all communications.

For discussion call Tony or Frank @ 828-488-1950 or contact William directly @ 804-523-8960. Send inquiries and loan requests to [william@williamhoylefinancial.com](mailto:william@williamhoylefinancial.com) or Fax 804-320-5270.

Please request, by email, a secure link for forwarding large files and sensitive information to us.



## FUNDING REQUEST FORM

This is not a loan application. While it may eventually become part of a formal application, the information will be used to determine if one or more of our lenders would be interested in funding your request. We might need additional information during this process since each lender has their own set of requirements. **ATTACH A SEPARATE SHEET IF YOU NEED MORE SPACE TO PROVIDE COMPLETE ANSWERS.**

1) Business name: \_\_\_\_\_ 2) Business Phone: \_\_\_\_\_

3) Business street address: \_\_\_\_\_

City, State, Zip, and County: \_\_\_\_\_

4) Nature of your business (service or product): \_\_\_\_\_

5) Date Started: \_\_\_\_\_ 6) Type of entity: \_\_\_\_\_

7) Do you serve other businesses, consumers, or both? \_\_\_\_\_

8) Contact information:

Name: \_\_\_\_\_ DOB: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Alt Phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_

Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Preferred contact email or phone? \_\_\_\_\_

9) Business website address: \_\_\_\_\_

10) List names of all 20% or more owners. Include ownership percentage for each: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11) How much of your own money (Including all 20% or more owners) will be invested in the business if requested funding is obtained? \_\_\_\_\_

12) Number of employees: Full-time # \_\_\_\_\_ Part-time # \_\_\_\_\_

13) Requested loan amount: \_\_\_\_\_

14) Available Collateral (Description and Value of each): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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15) Tell your story (Include details of source & use of funds including the funding that you are currently requesting, history of the business, goals for the business, any credit issues, etc.): \_\_\_\_\_

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16) If equipment purchase or lease provide full description and dollar amount of each item: \_\_\_\_\_

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17) Please provide additional information

- For each 20% or more owner:
  - 1) A copy of their 3 most recent year's personal tax returns
  - 2) Current personal financial statement
  - 3) Approximate credit score. These items may be sent directly to us from each individual owner; however, be sure they included the name of the company, listed in item #1, with their information.
- Last 3 years of business tax returns
- Current year interim business financial statement
- Last 3 months of business bank statements (all accounts)
- Rent roll if business involves rental space or properties

18) Please provide any other information that you believe should be considered with any special instructions or requests.

**Submissions To:**

William Hoyle Financial, LLC (p) 804-523-8960 (f) 804-320-5270 [william@williamhoylefinancial.com](mailto:william@williamhoylefinancial.com)

Please request, by email, a secure link for forwarding large files and sensitive information to us.

Submitting this form and additional documentation does not obligate you to accept any loan that might be offered to you. By submitting this information, you authorize William Hoyle Financial, LLC to attempt to identify lender(s) who might be willing to fund your business loan request.