

# ANNUAL BORROWER UPDATES



PO Box 19700, Irvine, CA 92623-9700  
Fax: 866.387.3131

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## ORGANIZATION

Organization Name

Address

City

State

Zip

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## PASTOR/SR. LEADER

Name

Email Address

Mobile Phone No.

Daytime Phone No.

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## PRIMARY CONTACT (If we have questions about your loan)

Primary Contact Name

Email Address

Mobile Phone No.

Daytime Phone No.

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## ADDITIONAL CONTACT

Contact Name

Position

Email Address

Mobile Phone No.

Daytime Phone No.

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## FISCAL YEAR-END REPORTING

### Number of paid staff we had a fiscal year-end:

Full-Time: \_\_\_\_\_ Part-Time: \_\_\_\_\_

### Average weekend attendance:

Adult: \_\_\_\_\_ Children: \_\_\_\_\_

Number of baptisms this year: \_\_\_\_\_

Number of "Giving Units" during our most recent Fiscal Year: \_\_\_\_\_

("Giving Units" is the number of people the church prepared a Giving Statement for at the end of the year for tax purposes)

### Top 10 Givers (No names, just amounts):

1. \$ \_\_\_\_\_ 6. \$ \_\_\_\_\_

2. \$ \_\_\_\_\_ 7. \$ \_\_\_\_\_

3. \$ \_\_\_\_\_ 8. \$ \_\_\_\_\_

4. \$ \_\_\_\_\_ 9. \$ \_\_\_\_\_

5. \$ \_\_\_\_\_ 10. \$ \_\_\_\_\_

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## CHECKLIST OF ITEMS TO SEND CDF

**Detailed Income and Expense Statements** – for your most recently completed fiscal year (if you have a statement that shows Budgeted vs. Actual figures, please provide that as well)

**Balance Sheet** – as of the last day of your most recently completed fiscal year

**Statement of Cash Flows** - for your most recently completed fiscal year, if available

**Budget** – for the current fiscal year

**Annual Report** - If the church prepares a year-end ministry report for its members, please send a copy

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## SIGNATURE

Signature

Date