



**VICTORIA MUTUAL BUILDING SOCIETY
8-10 DUKE STREET, KINGSTON**

INCOME STATEMENT AND QUESTIONNAIRE FOR SELF-EMPLOYED

Customer Name: _____ Profession/Occupation: _____

Home Address: _____

Phone Number(s): _____ 2. _____
(Area code) (Area code)

Business Name (if operating under a Business Name): _____

Nature of Business: _____

Business Address: _____

Business T.R.N. _____ Business Phone Number : _____
(where applicable) (Area code)

ESTIMATED NET INCOME (Monthly):	AMOUNT	
	\$	
1. Income from business		
2. Other Income (loan, partner, maintenance payments, remittances etc)		
TOTAL INCOME (1 + 2)		
EXPENSES		
3. Telephone		
4. Electricity		
5. Water		
6. Insurance <input type="checkbox"/> home, <input type="checkbox"/> motor car, <input type="checkbox"/> life <input type="checkbox"/> other :.....		
7. Cable		
8. Rent		
9. Taxes		
10. Loan payments <input type="checkbox"/> Mortgage <input type="checkbox"/> personal loans :.....		
11. Stationery/Office Supplies (where applicable)		
12. Wages (where applicable)		
13. Other Expenses (describe)		
TOTAL EXPENSES (Add Items 3 to 13)		
DISPOSABLE INCOME (TOTAL INCOME -TOTAL EXPENSES)		



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QUESTIONNAIRE

1. How long have you been engaged in this type of business. _____

2. How was the start up of the business funded, specify the source of funding. _____

3. Specify details of financial institution where the main business account is held:
Name: _____
Address: _____

4. State the average amount spent by each customer
- Below \$1000
 - \$1000-\$ 5000
 - \$5000-\$ 10,000
 - Above \$10,000

5. State the number of customers served by the business on a weekly basis
- Below 20 customers weekly
 - 20 -50 customers weekly
- Above 50, give approximate number

6. How much do you expect to lodge :
Weekly \$..... Or Monthly \$.....

Please provide additional information on the business

I confirm that the Information provided herein to the Society is accurate to the best of my knowledge.

Date:

.....
SIGNATURE OF APPLICANT

.....
SIGNATURE OF CSR



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The customer is required to provide documentation from the sections below based on the business registration status.

If the business is registered, the customer is required to provide one from the list of the documents at **Section A** and one document from the list at **Section B**.

If the business is unregistered, then the customer is required to provide any two of the documents listed at **Section B**.

Section A

- Copy of Business Name Registration Certificate
- Copy of Certificate of Incorporation

Section B

- In house financial statement for last two months
- Audit Financial Statement for the last year
- Reference letter from Bank
- Copy of bank statement or passbook
- Purchase order from two main customers (issued within two months of the date of application)
- Receipt for supplies purchased for the business
- Import licence
- Invoices for goods or services sold within the last three months
- Written Customer testimonial from two main customers
- Copy of any government issued permit or licence. (eg. Food handlers permit, vending permit, taxi permit etc.)
- Proof of membership in trade or professional association (letter from President, Treasurer or Secretary)

FOR OFFICE USE ONLY:

BRANCH RECEIVED _____

DATE: _____