



Please fill out this form, save it and attach it to an email to [rmezzo@ionbank.com](mailto:rmezzo@ionbank.com).

## Homeowner Association Lending Inquiry

Association _____	Board Contact _____	Taxpayer Identification Number _____
Address _____	State _____	Zip Code _____
Phone Number _____	Email _____	

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Management Company _____	Management Contact _____	
Address _____	State _____	Zip Code _____
Phone Number _____	Email _____	

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Attorney _____	Attorney Contact _____	
Address _____	State _____	Zip Code _____
Phone Number _____	Email _____	

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Insurance Company _____	Insurance Contact _____	
Address _____	State _____	Zip Code _____
Phone Number _____	Email _____	

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\_\_\_\_\_  
Year Association was declared

\_\_\_\_\_  
Loan purpose

\_\_\_\_\_  
Total project cost

\_\_\_\_\_  
Requested loan amount

\_\_\_\_\_  
Number of buildings

\_\_\_\_\_  
Number of units

\_\_\_\_\_  
Percentage of units owner occupied

\_\_\_\_\_  
Percentage of units owned by Banks

\_\_\_\_\_  
Percentage of units owned by Governments

\_\_\_\_\_  
Current Units Delinquent

\_\_\_\_\_  
Current Units Pending Foreclosures

\_\_\_\_\_  
Current Units Pending Lawsuits (if any, describe below)

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\_\_\_\_\_  
Current Monthly Common Charges

Please describe any special assessments with amounts and term.

Please describe any other long-term debt obligations of the Association.

\_\_\_\_\_  
Loan Purpose

\_\_\_\_\_  
Total Project Cost

\_\_\_\_\_  
Requested Loan Amount

\_\_\_\_\_  
Expected Requested Term in Years

Are there capital improvement plans? Yes

No

\_\_\_\_\_  
Amount of Fund Balance

\_\_\_\_\_  
Reserve Amounts (if any)

Please describe Association amenities.

Upon submission of this inquiry, a representative of our Business Banking team will contact you to discuss the next steps. Should you have any questions regarding this inquiry or Association Lending at Ion Bank, please contact:

**Robert A. Mezzo**  
VP, Commercial Banking  
CAI Educated Business Partner  
203.720.2627 or 203.525.0108  
rmezzo@ionbank.com

Individual submitting this inquiry:

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First Name

Middle Initial

Last Name

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Association Position

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Ownership Interest

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Phone Number

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Email Address