



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

Management Company

Management Contact

Address

State

Zip Code

Phone Number

Email

Attorney

Attorney Contact

Address

State

Zip Code

Phone Number

Email

Insurance Company

Insurance Contact

Address

State

Zip Code

Phone Number

Email

\_\_\_\_\_  
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**  
AVP, 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