



### **Bank Statement Income Questionnaire**

To accurately assess your income using bank statements, you must complete the following questionnaire to the best of your knowledge.

Name: \_\_\_\_\_ Business Name: \_\_\_\_\_

1. Percentage of ownership in the business: \_\_\_\_\_
2. Business Organizational Type (check one below)  
DBA                      Partnership                      LLC                      Corporation
3. Please describe the nature of your business, and how you generate income (please be specific):

4. Number of employees/contractors you pay: \_\_\_\_\_

5. Gross Annual Revenue: \_\_\_\_\_

6. Deposit methods of income (check all that apply)

- a. Paypal / Zelle / Venmo
- b. Check
- c. Credit Card
- d. Cash
- e. Wire

7. Do you incur these expenses for your business? If you mark "No", please explain why it does not apply.                      Yes    No

- |   |       |
|---|-------|
| a. Advertising                                  | _____ |
| b. Space (Rent/Lease)                           | _____ |
| c. Payroll (wages paid other than to applicant) | _____ |
| d. Insurance                                    | _____ |
| e. Cost of Goods Sold                           | _____ |
| f. General (Travel / Sales / Admin)             | _____ |

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

V2.3 030424