

Pre Screening Interview

Date & Time: _____

Agent: _____

Meeting/Telephone: _____

Name _____	Company _____	Tax Compliant (Y/ N): <input type="radio"/> Y <input type="radio"/> N: _____
Owner _____		Business Status: <input type="radio"/> Start-up (< 24M) <input type="radio"/> Established >24M
Tel# _____		
Registered: <input type="radio"/> T/As <input type="radio"/> L/Liability <input type="radio"/> Partnership <input type="radio"/> Farmer <input type="radio"/> Not registered		Period of Operation _____
Bankers _____		Sector: _____
Email Address: _____		Project Amount _____
		Loan Purpose _____

- Nature of Business/Services Provided _____

- How will the business generate income? _____

- Do you have an alternate source of income that could support loan payments? _____
- Have you consulted with any other financial institutions? _____
- If yes, which AFI's did you consult with and what were their remarks? _____
- Do you have a Business Plan, Financial Statement or any other documentation available?

- Do you have any objections to being referred to an alternate Financial Institution (Y/N) _____
- How did you hear about us? Newspaper TV Friend S/ Media Radio
Other _____
- Other DBJ services beneficial to the prospect _____

Recommended Action Plan

- _____
- _____
- _____

