



Personal & Business Credit Consulting Services FREE Assessment & Intake Form

Name of your consultant / agent (nombre de su consultor o Agente) _____

Personal Information

First Name _____ Last Name _____

Email: _____ Cellular: _____

Address _____

City _____ State _____ Zip Code _____

Date of birth: _____ Social Security Number: _____

Do you own a business? ¿Eres propietario de un negocio? [] Yes [] No

Name of your Business if you own a business? ¿Nombre de su negocio? _____

Personal Credit Information

Please mark all that apply to you. Which of the following is on your credit report?

Marcar todos lo que aplican a su situación .Que cree que está afectando su puntaje.

- [] Late Payments / Pagos atrasados
- [] Collections / coleccion
- [] Liens / embargos
- [] Repossession / reposiciones
- [] Judgement / Demanda legal
- [] Bankruptcy / bancarota
- [] Hard inquires / muchas revisiones
- [] Accounts in error / cuentas que no me pertenecen
- [] Foreclosure
- [] Other: _____

What is your credit score: list the ones you know / cual es su puntaje de credito?

____ Experian ____ Equifax ____ TransUnion ____ I do not know all credit scores / no me todos los puntajes

Do you have joint accounts, with spouse, children, parents or other person? [] Yes [] No

Tiene credito en comun con su esposa, hijos, padres o otra persona

Who is the person you have joint credit with? _____

Business credit information

Please mark all that apply to you. Which of the following is affecting your business credit?

Marcar todos lo que aplican a su situación Que está afectando el credito de su negocio.

- [] Stopped paying a business loan / deje de pagar un credito del negocio
- [] Entered into a settlement with a business lender / entre en un arreglo de pago con una financiera
- [] Falling behind on payments with business loans / estoy atrasando con pagos de un préstamo de negocio
- [] I have too many business loans / tengo muchos prestamos de negocios
- [] I did not know that my Business has a Business credit report / no sabia que le negocio tiene un reporte de credito
- [] I have never had business credit, interested in establishing it / me interesa establecer el credito de mi negocio

Please mark all that apply to you. Marcar todos lo que aplican a su situacion

- [] I was denied for a personal credit card or business credit card / me rechazaron para tarjeta de credito
- [] I was denied for business loan / fui rechazado para un prestamo de negocio dado a credito
- [] I was offered a high interest rate on a business loan because of my credit/ interes muy alto por mi credito
- [] I was denied for a mortgage / fui rechazado para una hipoteca

Before we provide your business, credit, or financing consulting we evaluate this form. This is a FREE service. Upon evaluation, we will send you an agreement if we believe we can assist you. By signing below, you attest that all information is true and correct. We may need to obtain a personal credit report or business information if applicable. We will send the appropriate authorization forms with this form or after evaluating this form. **PRIVACY POLICY: We will not share your information, sell your information. We will only use your information to evaluate your situation and provide consulting services.** If you send by email, this will constitute and replace wet signature.

Signature

Date