



Quote Request Form (Equipment Finance)

1. **Company Name/City, State:** _____

Contact: _____ **Decision Maker:** _____

Phone:() _____ **Fax:**() _____

Email: _____ **Company Website:** _____

2. **Estimated Equipment Delivery/Installation Schedule:** _____

Deadline for Making a Financing Decision: _____

3. **Equip.Cost:** \$ _____ **❖ Equip. Plans @ End-of-Term:** ___Keep___ Upgrade___ Unsure

4. **Equipment/Project:** Attach Vendor Proposal(s) or Other Description _____

5. **Number the Items below in order of Importance (from 1 to 6):** ****Optional*

- _____ Cash Flow (minimize payments; cash can be used for other purposes)
- _____ Tax Considerations (avoiding the "Alternative Minimum Tax"; quicker write off)
- _____ Interest Rate (would select a higher payment to achieve a lower rate)
- _____ Preserve Cash & Credit Lines (other uses for cash & credit; maximize financial flexibility)
- _____ "Off-Balance Sheet" Lease (to improve Balance Sheet ratios- often used by Banks in determining lending limits & if a borrower is in compliance with loan covenants)
- _____ Establishing a Line of Credit (to assist in planning/budgeting for ongoing capital expenditures)

6. **Specific Terms Preferred:**

- _____ Years (3, 4, 5, or longer?)
- _____ Fully Amortized **or** _____ Fixed Balloon (reduce Monthly Payment) **or** _____ FMV Option (Tax Lease)
- _____ Off-Balance Sheet Lease
- _____ TRAC Lease (Trucks & Trailers only)
- _____ Not Certain? (Would like to consider more than one option or discuss recommendation)
- _____ Other (Please see #11 below)

7. **D&B Rating** (if applicable) _____; **Debt Rating** (if applicable) _____

8. **# of Years in Operation** _____; **Nature of Business** _____

9. **Please provide a copy of your FYE Financial Report, OR fax/ email a Summary of Financial Data for a "ballpark" quote.**

10. **Other Financing Options being considered?** _____ CASH _____ BANK _____ LEASING COMPANY

*Please list name of BANK or LEASING CO. if applicable: _____

11. **Other Requests or Special Instructions:** _____

Please forward information to Global Funding: Email- info@globalfundinginc.com
Fax- (770) 565-7288

[All information treated confidentially. Individual Transactions, Lines-of-Credit, & Refinancing provided.]

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