



Woodland Financial Partners, Inc.
Menominee Tax & Loan Building
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INQUIRY

Today's Date: _____

CONTACT INFORMATION			
NAME (FIRST, MIDDLE, LAST):		EMAIL:	
PHYSICAL ADDRESS:		CITY:	STATE:
MAILING ADDRESS (IF DIFFERENT FROM PHYSICAL ADDRESS):		CITY:	STATE:
TRIBAL AFFILIATION:		COUNTY:	
CELL PHONE:	WORK PHONE:	HOME PHONE:	
WHAT IS THE BEST WAY TO CONTACT YOU?		WOULD YOU LIKE TO BE INCLUDED ON OUR MAILING LIST TO NOTIFY YOU OF EVENTS AND SERVICES?	
<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Mail		<input type="checkbox"/> Yes <input type="checkbox"/> No	

ABOUT YOU	
<p>Our organization is frequently funded by the Federal Government and as such we request your gender and race/ethnicity in order to comply with Federal laws prohibiting discrimination against applicants seeking to participate in programs. You are not required to furnish this information, but are encouraged to do so. This information will not be used in evaluating your application or to discriminate against you in any way. However, if you choose not to complete the information below, we are required to note the race and ethnicity of applicants on the basis of visual observation or surname.</p>	
GENDER:	DATE OF BIRTH (MM/DD/YYYY):
<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other	
RACE/ETHNICITY (SELECT ALL THAT APPLY):	
<input type="checkbox"/> African American <input type="checkbox"/> American Indian (Tribe: _____) <input type="checkbox"/> Alaska Native (Village: _____)	<input type="checkbox"/> Asian <input type="checkbox"/> Caucasian <input type="checkbox"/> Latino or Hispanic
<input type="checkbox"/> Native Hawaiian <input type="checkbox"/> Pacific Islander <input type="checkbox"/> Other (please specify): _____	
HOW DID YOU HEAR ABOUT US (SELECT ONE)?	
<input type="checkbox"/> Pamphlet/Brochure <input type="checkbox"/> Website <input type="checkbox"/> Email <input type="checkbox"/> Tribe (name of tribe): _____ <input type="checkbox"/> Word of Mouth (name of person): _____	<input type="checkbox"/> An Event (please specify): _____ <input type="checkbox"/> Community Entity (please specify): _____ <input type="checkbox"/> Social Media (LinkedIn or Facebook): _____ <input type="checkbox"/> Local or Regional Organization (please specify): _____ <input type="checkbox"/> Other (please specify): _____

YOUR INTERESTS
WHAT SERVICES ARE YOU INTERESTED IN?
<input type="checkbox"/> Personalized One-on-One Assistance/Coaching (please describe below):
<input type="checkbox"/> Workshops/Trainings/Classes (please describe below):
<input type="checkbox"/> Other (please specify):

BUSINESS LOAN:

What size of business loan are you interested in (select all that apply)?

- \$5,000 or less
- \$35,000 or less
- \$35,001 or more

If for general business, what would you use loan proceeds for?

- Working capital
- Inventory
- Improvements
- Equipment / Machinery
- Renewable / Green Energy
- Commercial Real Estate / Construction
- I don't know yet

What is your business Industry?

Please estimate the total loan amount you would be interested in (if you know): \$ _____

FINANCIAL WELLNESS

I have a:

- Business Plan
- Balance Sheet
- Cash Flow
- Budget / Projection

DO YOU USE RENEWABLE ENERGY?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> YES | <input type="checkbox"/> NO |
|------------------------------|-----------------------------|

If so, please list what you currently use:

DO YOU HAVE CONSERVATION PRACTICES ON YOUR OPERATION?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> YES | <input type="checkbox"/> NO |
|------------------------------|-----------------------------|

Client Signature: _____ Date: _____

WFP Signature: _____ Date: _____