



# Alliance Funding Group (AFG) Questionnaire for Equipment Leasing & Financing Services

**BANK NAME:** \_\_\_\_\_ **CITY/STATE/ZIP:** \_\_\_\_\_ **ASSET SIZE:** \_\_\_\_\_ **LOAN TO DEPOSIT RATIO:** \_\_\_\_\_

Is your bank interested in increasing fee income to its bottom line?  Yes  No

ICBA Corporate Member AFG will be rolling out an application only equipment-leasing program for your bank's customers generating fee income for your bank would you be interested in the service?  Yes  No

What Bank Software System is installed at Your Bank?

- Jack Henry & Associates     FIS     Shazam
- Fiserv     Computer Services Inc. (CSI)     OTHER: \_\_\_\_\_

Do you lose equipment-leasing/financing opportunities because you are currently unable to provide this service?  Yes  No

Do you refer equipment-leasing/financing transactions to other leasing companies to assist your customers?  Yes  No    If yes, who do you refer them to? \_\_\_\_\_

Does your Credit Department receive inquiries from either third-party leasing/financing companies directed at your commercial loan customer base?  Yes  No

Given your present loan limits and capital structure, are you interested in additional creditworthy loan transactions in the amount of \$300K supporting your banks client request versus losing this business to another banks offering?  Yes  No

Would you entertain participating in lease/financing transactions, from outside your geographic footprint with a satisfactory credit profile? The transaction could be generated from your bank that has reached its credit or legal lending exposure limit, or could be a client that generates and would like to participate out to you, again with a satisfactory credit profile. AFG would handle all the required administrative functions. Please check mark your areas of interest:

- In your marketing area
- Outside your marketing area
- Both, in or out of marketing area



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What type(s) of financing do you provide in your market area? (Check all that apply.)

- Equipment                       SBA                       Other: \_\_\_\_\_  
 Real Estate                       Personal

Do you consider yourself the following type of community bank?

- Retail Lender     Commercial Lender     Or Both

Do you currently book any leases/financing for your own account? If so, how large is your lease/finance portfolio?

- Yes     No    \_\_\_\_\_

If you have a lease/financing portfolio, would you be interested in selling it?                       Yes     No

If you have a lease/financing portfolio in your bank, who is the individual with the responsibility?

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Title: \_\_\_\_\_

Are you a member of the following Associations? (Check all that apply & Name which State Association & or Bankers Association):

State Bank Association: \_\_\_\_\_ Bankers Association: \_\_\_\_\_ ICBA: \_\_\_\_\_  
Bankers Bank: \_\_\_\_\_/Other: \_\_\_\_\_

Questionnaire Completed By: \_\_\_\_\_ Print Name: \_\_\_\_\_

Date: \_\_\_\_\_ Phone: \_\_\_\_\_ Ext: \_\_\_\_\_