

Nationwide Application Form

In addition to this form, please
provide these documents if available:

- 2 Years of Annual Commission Reports
- 2 Years Agency P&L and Balance Sheet
- 2 Years Tax Returns and Personal Financial Statement for Owners
- Current Nationwide Contract
- Nationwide Valuation
- Purchase Agreement (if available)
- Ownership Breakdown
- 3 Months Bank Statements
- Pro-Forma Projection

Contact Information

Contact Name*

Company*

Phone*

Email*

Additional Information — This information is not required at this time, but it may speed up your loan application process.

Company Website

Address

City

State

Zip

Year Founded

Tax ID

Loan Option

I am interested in a ...

☐

Commission-Based Streamlined Loan

☐

Traditional Underwriting Loan

☐

Help Me Choose

Annual Commission Revenue*

Desired Loan Amount*



WESTFIELD BANK

Principals

Please include Individuals with 20% ownership or greater.

Principal 1

Full Name	Social Security Number	Date of Birth	Ownership %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Principal 2

Full Name	Social Security Number	Date of Birth	Ownership %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Principal 3

Full Name	Social Security Number	Date of Birth	Ownership %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Principal 4

Full Name	Social Security Number	Date of Birth	Ownership %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Principal 5

Full Name	Social Security Number	Date of Birth	Ownership %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Upon completion, here are two simple ways to submit your form and any additional documentation listed within the application:

Visit westfield-bank.com/nationwide to securely upload all documentation through ShareFile.

-OR-

Fax all documentation to us at 330.661.6323