

Loan Assessment Form

This loan assessment form sample is designed specifically for credit unions to streamline the evaluation process. It includes essential fields that capture borrower information, loan purpose, and financial details efficiently. Utilizing this template helps credit unions make informed lending decisions quickly and accurately.

Borrower Information

Full Name

Date of Birth

Address

Phone Number

Email Address

Loan Details

Loan Amount Requested

Purpose of Loan

If 'Other', please specify

Preferred Repayment Period (months)

Financial Information

Monthly Gross Income

Employment Status

List Existing Debts (if any)

List Major Assets (optional)

Submit Loan Application