



capitalize
FUNDING

Independent Broker Application

Company Information

*If you are **applying using an EIN**, begin here. Otherwise, skip to the next section.*

Legal Name _____

DBA _____

Physical Address _____

Federal Tax ID _____

Inception Date _____

Website _____

Phone Number _____

Owner Information

Full Name _____

Home Address _____

Phone Number _____

Date of Birth _____

Social Security _____

Ownership Percentage _____



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Broker Questionnaire

How many years of MCA experience do you have? _____

What is your previous MCA experience? _____

How do you market to small business owners? _____

How do you acquire your leads? _____

Do you charge a broker/application fee? _____

What are you looking for in a partner? _____

Who are you currently working with? _____

How did you hear about Capitalize Funding? _____

How many submissions should we expect per month? _____

Average funding amount per month? _____

Average deal volume per month? _____