

# Credit Approval Worksheet

Subject \_\_\_\_\_ Date \_\_\_\_\_

Street Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

## Credit References

Company \_\_\_\_\_

Fax # \_\_\_\_\_

Terms \_\_\_\_\_ High Credit \_\_\_\_\_

Current Balance \_\_\_\_\_ Yrs. Sold \_\_\_\_\_

Payments:  COD  Prompt  Discounts  Slow/#Days \_\_\_\_\_

Unjust Deductions?  Yes  No

Returned Checks?  Yes  No

Past Due Balance: \_\_\_\_\_

Remarks: \_\_\_\_\_

Information Supplied By: \_\_\_\_\_

Company \_\_\_\_\_

Fax # \_\_\_\_\_

Terms \_\_\_\_\_ High Credit \_\_\_\_\_

Current Balance \_\_\_\_\_ Yrs. Sold \_\_\_\_\_

Payments:  COD  Prompt  Discounts  Slow/#Days \_\_\_\_\_

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Returned Checks?  Yes  No

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Payments:  COD  Prompt  Discounts  Slow/#Days \_\_\_\_\_

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Past Due Balance: \_\_\_\_\_

Remarks: \_\_\_\_\_

Information Supplied By: \_\_\_\_\_

Company \_\_\_\_\_

Fax # \_\_\_\_\_

Terms \_\_\_\_\_ High Credit \_\_\_\_\_

Current Balance \_\_\_\_\_ Yrs. Sold \_\_\_\_\_

Payments:  COD  Prompt  Discounts  Slow/#Days \_\_\_\_\_

Unjust Deductions?  Yes  No

Returned Checks?  Yes  No

Past Due Balance: \_\_\_\_\_

Remarks: \_\_\_\_\_

Information Supplied By: \_\_\_\_\_

## Bank Information

Years Account Open: \_\_\_\_\_ Average Balance: \_\_\_\_\_

Satisfactory Account:  YES  NO If No, Why? \_\_\_\_\_

Bad Checks  YES  NO Remarks: \_\_\_\_\_

Information Supplied By: \_\_\_\_\_

Salesperson: \_\_\_\_\_

Customer Account: \_\_\_\_\_

Credit:  Granted  Denied

Terms: \_\_\_\_\_

Credit Limit: \$ \_\_\_\_\_

Broker: \_\_\_\_\_

Broker Number: \_\_\_\_\_

Reason: \_\_\_\_\_

Approval: \_\_\_\_\_

Date Approved: \_\_\_\_\_