



Loan Worksheet

www.zimplemoney.com ♦ t: 949.209.9844 x500 ♦ f: 877.329.9467

	Lender	Borrower	Notes / Final Agreement
\$ Loan Amount			
% Interest Rate			
# 360 or 365 Day year			
Type of Loan There are several loan options, please review the User Guide and Help Section			
Collect interest through "Due" date or "Paid" date			
Loan Term – How many months/years?			
\$ Payment amount – Periodic payment			
Payments – Monthly, Bi-weekly, other			
Calculate interest from what date – interest start date			
Payment start date – (defaults to 30 days following Interest start date)			
Grace period in days			
Late Fee \$ - Flat, Minimum, Maximum, % of Payment			
Return Item Fees			



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Additional Lender Charges at set-up			
Additional recurring fees: transaction/servicing fees, insurance, taxes, other			
Other Notes:			

Notes:

1. Check your State for the maximum interest you can charge and IRS for the minimum you can charge
2. Type of Loan: Review the User Guide and FAQ to select the correct note type. Send a copy of your note to members@ZimpleMoney.com if you would like us to make a recommendation.



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Borrower Information:

Name: _____
Street: _____
City, State, Zip: _____
E-mail: _____
Telephone: _____
SS#: _____
D/L: _____

Name of Bank: _____
Routing number: _____
Account number: _____

Credit Card: MasterCard ___ VISA ___ AMEX ___ DISCOVER ___ **(check one)**
Card Number: _____
Expiration: _____
Card Security Number: _____

Lender Information:

Name: _____
Street: _____
City, State, Zip: _____
E-mail: _____
Telephone: _____
SS#: _____
D/L: _____

Name of Bank: _____
Routing number: _____
Account number: _____

Credit Card: MasterCard ___ VISA ___ AMEX ___ DISCOVER ___ **(check one)**
Card Number: _____
Expiration: _____
Card Security Number: _____

Who is paying:

The loan set-up fees? Borrower ___ / Lender ___ **(check one)**
The transaction fees? Borrower ___ / Lender ___ **(check one)**
The data entry fees, if any? Borrower ___ / Lender ___ **(check one)**



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Need Help? Fax or email the Loan Worksheet to ZimpleMoney at 877.FAX.ZIMP (877.329.9467) or members@zimplemoney.com

Register FIRST - All parties of the loan must register at ZimpleMoney.com or affiliated websites prior to authorizing.

I authorize ZimpleMoney as follows:

1. Set-up the above described loan on the ZimpleMoney system
2. To charge my credit-card for the One-time Set-up fees and Premium Customer Support posted on the website.
3. To charge my credit-card a data entry fee as posted on the website.

I confirm that I have read the online ZimpleMoney User Agreement, agree to its terms and conditions and to pay the fees as posted on the website.

X _____ **Date:** _____

Name: _____

Role: Lender ___ / **Borrower** ___ (check one)

X _____ **Date:** _____

Name: _____

Role: Lender ___ / **Borrower** ___ (check one)

X _____ **Date:** _____

Name: _____

Role: Lender ___ / **Borrower** ___ (check one)

X _____ **Date:** _____

Name: _____

Role: Lender ___ / **Borrower** ___ (check one)