

## Application Checklist:

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- I called (215-399-1339) or emailed [info@merchantsfund.org](mailto:info@merchantsfund.org) to review this application and my plans for how I hope to use the grant for my business.
- I have included three years of US, state and city taxes.
- I have included a profit and loss (P&L) statement for the current year. I understand that this is important to demonstrate the current financial health of my business.
- I have included the applicable licenses and permits from the city and state to demonstrate that my business is operating legally.
- I have included specific costs obtained from a reputable vendor for all requested services and goods.
- I would like to receive a postcard when you receive my application.  
 OR I would like to receive an email when you receive my application.  
Email address: \_\_\_\_\_

By prior arrangement you may submit some or all of your application and documents by email. Please call well ahead of the deadline to make arrangements.

## Review Process

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- Applications must be postmarked by the deadline. You do not have to deliver your application in person. Basic information about your company is logged into TMF database upon receipt.
- Do not submit notebooks or heavy folios just the application and supporting documents.
- A preliminary review may require written responses to specific questions mailed or emailed to you such as missing information, a poorly constructed budget for the use of the grant, vague descriptions of specific capital improvements, missing taxes and permits, etc. Respond to all questions in a timely fashion and in writing so that your responses can be added to your file. Please call if you have questions. If you choose not to respond, your application may not be reviewed at the discretion of the staff.
- Some site visits are made anonymously to observe how you and your employees interact with your customers. When anonymous site visits are not appropriate you will be contacted by the staff or a consultant to schedule a visit.
- The Program Committee reviews all submissions and makes the final decision to fund in whole, in part or not at all. Occasionally, some applications may be deferred to the next deadline in order to obtain more information to enhance the application.
- Preliminary decisions are issued approximately six weeks after the grant deadline. TMF does not give out grant decisions over the phone. You will be sent an email or a letter if you do not use email.
- Checks and grant documents are issued as soon as possible after the Committee meets. Checks may be issued to the vendor, the CDC/sponsor or the individual merchant depending on the circumstances.

The Merchants Fund is committed to providing for the economic needs of the merchant community with modest grants. Merchants must do business in Philadelphia and have conducted business for a minimum of three years.

**Business Stabilization grants** of up to \$10,000 are available to help small businesses remain stable and viable in the face of economic challenges, changes and crisis. The application process is competitive. There is no guarantee of an award. We recommend that merchants explore other funding sources simultaneously to the grant application process.

**The Merchants Fund does not support:**

- New ventures
- Businesses operated from home or costs related to moving outside of the home
- Businesses holding only an off premises liquor license
- Excluded businesses: lawyers, doctors, accountants, brokers (insurance, real estate, stock), consultants, and other professionals. Please call if you are unsure whether your business is qualified to be considered for a grant.

*The Merchants Fund does not discriminate based on race, color, religion, national origin, age, gender, sexual orientation, marital status, or disability.*

**Personal Information**

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Please check one: Sole Proprietor  Corporation  Limited Liability Corp.

Name: \_\_\_\_\_  
*(The applicant is the Merchant and primary owner.)*

Home Address: \_\_\_\_\_  
\_\_\_\_\_

Email Address: \_\_\_\_\_ Telephone Number: \_\_\_\_\_

The best way to reach me is by: phone  email

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

U.S. Citizen: Yes  No  Naturalized Citizen/Resident Alien: Yes  No

Marital Status: Married  Single

What is the name of the business? \_\_\_\_\_

Percentage of business owned. \_\_\_\_\_ *(If there is more than one owner attach a separate page with name and contact information and percentage of business owned.)*

What is the nature of the business conducted? \_\_\_\_\_

Address of business: \_\_\_\_\_

How long have been you in business? \_\_\_\_\_

How many employees do you have? (include yourself) Full time \_\_\_\_\_ Part time \_\_\_\_\_

State Tax Number: \_\_\_\_\_ Federal Tax Number: \_\_\_\_\_

Is your spouse also significantly involved/co-operator of the business? Yes  No

Describe role: \_\_\_\_\_

Name of spouse: \_\_\_\_\_ Spouse's Social Security Number: \_\_\_\_\_

U.S. Citizen: Yes  No  Naturalized Citizen/Resident Alien: Yes  No

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Do you have dependents whom you support (over 50% of annual expenses) that reside with you? If so list each person and their relationship to you.

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Provide the name and phone number of three people or the officers of the corporation to whom The Merchants Fund may refer to confirm the information provided (*Do not include family or friends unless they are actively involved in the business*):

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**Business and Financial Information**

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Please provide the following:

- copies of all current licenses from the City
- current business plan, if available
- 3 years of state income tax returns
- 3 years of Philadelphia city income tax returns (if applicable)
- 3 years of federal income tax returns
- current profit and loss statement

Who maintains your financial records? Please provide the name and contact information. If it is a member of the family please note the relationship.

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**Assets**

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Checking Accounts:

_____	_____
(bank name)	(current balance)

Savings/Retirement/Investment/Trust Accounts:

_____	_____
(bank name)	(current balance)

_____	_____
(bank name)	(current balance)

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**Real Estate:**

Do you own or rent the location of the business? Own  Rent

Assessed value of Real Estate Including Investment Properties (in your name or your spouse's): \_\_\_\_\_

Unpaid Mortgage Balance on Real Estate: \_\_\_\_\_

**Grants for Business Stabilization**

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These grants are designed to help small businesses remain stable and viable in the face of economic challenges, changes, opportunity, and crisis.

These grants include: physical improvements or repairs to your building, equipment, fixtures, business plans, web site development and enhancement. Please call to discuss your plan before submitting your application.

The Merchants Fund may require a site visit to the business as part of the application process.

You may apply for up to \$10,000. Amount you are applying for: \$ \_\_\_\_\_ (total must be equal to list below)

Please describe how you will use the grant. Be as specific as possible. For example: if you are requesting funds for physical improvements or equipment please send photos, drawings or specifications

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Do you have a deadline for when you need the grant in hand to meet a commitment?

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

It is **required** that you have someone from a supporting agency sign your application. Examples: Your local Community Development Corporation (CDC), Small Business Development Center (SBDC), Merchants Association, Empowerment Zone, Neighborhood Association, Corridor Main Street manager, etc. If you need help identifying an appropriate agency, please call or email.

Sponsoring Agency: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

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The information provided in this application is true and accurate. I grant permission to the agents of The Merchants Fund to contact and discuss information contained in this application with the references provided. I agree to allow The Merchants Fund to run a credit check.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Signature (spouse): \_\_\_\_\_

*Information provided in this application is confidential and will be used solely to determine eligibility for a grant from The Merchants Fund.*