



Loan Worksheet

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

	Lender	Borrower	Final Agreement
Loan Amount			
Interest Rate (1)			
Type of Loan (2)			
Length of Loan (3)			
Payments (4)			
Interest start date (5)			
Payment amount – estimated with ZimpleMoney calculator			
First payment date – usually 30 days after the loan is made			
Grace period – members decide			
Late fee – members decide			
Bounced check fee – ZimpleMoney charges \$9.00			
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: amortized, interest only, fixed payment amount, final payment amount, or principal and interest due at maturity
3. Length of the loan or term: 12 months, 24 months, 3 years, 5 years or other period
4. Payments: monthly, quarterly, annually or at maturity
5. When does the interest start? – Usually 30 days from the loan date.

Lender _____ Borrower _____
 Initial Initial



Loan Worksheet

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

Borrower Information:

Name: _____
Street: _____
City, State, ZIP: _____
E-mail: _____
Telephone: _____
SS#: _____

Borrower Checking, Savings or Pre-paid Debit card information:

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

Credit Card: MasterCard, VISA, AMEX, DISCOVER (circle)

Card Number: _____
Expiration: _____
Card Security Number: _____

Lender Information:

Name: _____
Street: _____
City, State, ZIP: _____
E-mail: _____
Telephone: _____
SS#: _____

Checking, Savings or Pre-paid Debit card information:

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

Credit Card: MasterCard, VISA, AMEX, DISCOVER

Card Number: _____
Expiration: _____
Card Security Number: _____

Who is paying for the loan set-up and servicing? Borrower / Lender (circle)

Lender _____ Borrower _____
Initial Initial



Loan Worksheet

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

Do you need help to set-up this loan? Fax the Loan Worksheet to ZimpleMoney at 877.FAX.ZIMP (877.329.9467)

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 fee posted on the website
3. To charge my credit card for the monthly service fee posted on the website

I confirm that I have read the ZimpleMoney User Agreement and agree to its terms.

X _____ **Date:** _____
Name: _____
Role: Lender / Borrower (circle)

X _____ **Date:** _____
Name: _____
Role: Lender / Borrower (circle)

X _____ **Date:** _____
Name: _____
Role: Lender / Borrower (circle)

X _____ **Date:** _____
Name: _____
Role: Lender / Borrower (circle)

Lender _____ Borrower _____
Initial Initial