JAKEN AVIATION A division of Jaken Finance Group

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Aircraft Loan Borrower Questionnaire

Fast, flexible aircraft financing | Single-engine piston, LSA & experimental aircraft

How this works: complete every section that applies and return this form with the Stage 1 documents in Section 11; tax returns and other Stage 2 items follow after we review Sections 1-10. Program basics: single-engine piston, Special LSA, Van's, Sling, experimental and specialty aircraft only. Twin-engine aircraft and seaplanes / float / amphibious aircraft are not eligible. Minimum down payment is 15% on loans up to $149,999 and 20% on loans of $150,000+ (20% for all experimental and specialty aircraft). Maximum term is 240 months (180 months for experimental and specialty). Your rate is set by aircraft class and year, loan amount, and TransUnion credit score.

1. QUICK AIRCRAFT SNAPSHOT

Start here

Aircraft type (make & model, e.g. Cessna 182) | Year built | Age (years) | Purchase price ($)

Is the aircraft under contract (signed purchase agreement or LOI)? ○ Yes ○ No

If yes, contract date | If no, where are you in the search?

2. ELIGIBILITY SCREEN

A 'Yes' on either of the first two questions ends eligibility for this program

Is the aircraft a twin-engine / multi-engine aircraft? ○ Yes ○ No

Is the aircraft a seaplane, or equipped with floats or amphibious floats? ○ Yes ○ No

Loan purpose

○ Purchase ○ Refinance ○ Cash-out refinance

3. BORROWER INFORMATION

Full legal name (first, middle, last) | Date of birth (MM/DD/YYYY)

Email | Mobile phone | Alternate phone

Home street address

City | State | ZIP | Years at address

Citizenship

○ U.S. citizen ○ Permanent resident ○ Other

Will there be a co-borrower?

○ No ○ Yes (complete below)

Co-borrower full legal name | Relationship to borrower | Co-borrower DOB

Co-borrower email | Co-borrower phone

Confidential. Used solely to evaluate and place your aircraft financing request. Not a loan application or commitment to lend.
Jaken Aviation, a division of Jaken Finance Group (Lake Zurich, IL), is a brokerage, not a direct lender. All loans subject to lender approval.

4. OWNERSHIP & TITLING

LLC and trust borrowers add $250 to the origination fee

Aircraft will be registered / titled in the name of

- ○ Individual
- ○ Joint individuals
- ○ LLC
- ○ Trust
- ○ Corporation

Entity or trust name (if applicable) | State of formation | EIN

Members / managers / trustees and ownership %

Will each owner of 20% or more personally guarantee the loan? ○ Yes ○ No

5. AIRCRAFT DETAILS

Aircraft class (select one)

- ○ Traditional GA piston
- ○ Sling
- ○ Motor glider
- ○ Special Light-Sport (SLSA)
- ○ Experimental (amateur-built)
- ○ Sailplane
- ○ Van's RV
- ○ Vintage (pre-1950)
- ○ Piston warbird

Airworthiness certificate

- ○ Standard
- ○ Special - Light Sport
- ○ Experimental
- ○ Other / unsure

N-number | Airframe serial number | Engine make / model | Seats

Total time airframe (TTAF) | Engine time since major overhaul (SMOH) | Propeller time since overhaul | Last annual / condition insp.

Avionics / panel summary | Home airport (ID)

Does the aircraft have any damage history? ○ Yes ○ No

Has a pre-buy inspection been completed or scheduled? ○ Yes ○ No

If damage history or open squawks, describe:

Intended use

- ☐ Personal / recreational
- ☐ Business travel
- ☐ Flight training / rental
- ☐ Leaseback

6. TRANSACTION & LOAN REQUEST

Refi: current aircraft value ($) | Down payment ($) | Down payment (%) | Loan amount requested

Requested term

- ○ 240 months (20 yr)
- ○ 180 months (15 yr)
- ○ 120 months (10 yr)
- ○ Other (note below)

Other term / payment target | Target closing date

Seller type

- ○ Private party
- ○ Dealer / broker
- ○ Builder (new aircraft)

Seller / dealer name

Seller contact phone / email

Escrow / title company (if chosen)

Escrow contact

Origination fee (minimum $1,250): preferred handling

- ○ Add to the loan
- ○ Pay through escrow at closing

Refi only: current lienholder

Current payoff

Cash-out amount wanted

7. CREDIT PROFILE

Pricing uses your TransUnion score

Estimated TransUnion credit score (borrower)

- ○ 780+
- ○ 750 - 779
- ○ 740 - 749
- ○ 720 - 739
- ○ Below 720
- ○ Don't know

Estimated TransUnion credit score (co-borrower)

- ○ 780+
- ○ 750 - 779
- ○ 740 - 749
- ○ 720 - 739
- ○ Below 720
- ○ N/A

Any bankruptcy, foreclosure, repossession, or short sale in the past 7 years?	○ Yes	○ No
Any outstanding judgments, tax liens, or delinquent federal debt?	○ Yes	○ No
Are you currently a party to any lawsuit?	○ Yes	○ No

If yes to any of the above, explain:

8. EMPLOYMENT & INCOME

Income documentation required on loans over $200,000

Employment type

- ○ W-2 employee
- ○ Self-employed / owner
- ○ Retired
- ○ Other

Employer or business name

Title / position

Years there

Annual gross income - borrower

Annual gross income - co-borrower

Other income (source & annual $)

Total monthly debt payments (mortgage, auto, cards, etc.)

Monthly housing payment

9. LIQUIDITY & ASSETS

Liquidity is verified on every loan

Checking & savings ($)

Brokerage / investment ($)

Retirement accounts ($)

Approx. net worth ($)

Source of down payment and closing funds

Liquid funds remaining after closing ($)

Is any part of the down payment borrowed or gifted?	○ Yes	○ No

10. PILOT & INSURANCE

Highest pilot certificate

○ Student ○ Sport ○ Recreational ○ Private ○ Commercial ○ ATP ○ None

Total flight hours | Hours in this make / model | Ratings (instrument, complex, tailwheel...)

Will anyone else fly the aircraft? Names / experience

Aviation insurance agent / company | Agent phone | Agent email

Hull and liability coverage is required before closing. The lender must be named lienholder and loss payee (ISAOA); exact wording will be provided with the approval so your agent can issue the binder.

11. DOCUMENTS TO SUBMIT

Two stages. Check what is attached.

Stage 1: send with this questionnaire

- ☐ Government-issued photo ID (each borrower and guarantor)
- ☐ Most recent 2 months of bank statements and most recent brokerage / investment statements, all pages
  Required on every loan to verify liquidity
- ☐ Signed purchase agreement or LOI (if under contract), aircraft spec sheet, and pre-buy report (if completed)

Stage 2: send after we review Sections 1-10 *We will tell you when; do not hold this form for these*

- ☐ Federal tax returns for the last 24 months (2 years), all pages and schedules
  Required on every loan
- ☐ Most recent W-2s (if employed)
  Income verification is mandatory on loans over $200,000
- ☐ Recent logbook entries: airframe, engine, prop, and last annual
- ☐ LLC: articles, operating agreement, EIN letter | Trust: certification of trust
  Entity and trust borrowers only
- ☐ Refinance: current loan statement / payoff letter and aircraft registration
  Refinance only

12. CERTIFICATION & AUTHORIZATION

By signing below, I certify that the information in this questionnaire is true and complete to the best of my knowledge. I authorize Jaken Aviation, a division of Jaken Finance Group, to share this information and my documents with its lending partners for the purpose of evaluating my aircraft financing request, and I authorize those lenders to obtain a consumer credit report (including TransUnion) and to verify my employment, income, assets, and the information provided. I understand that rate commitments are typically good for 30 days from loan approval and credit approvals for 90 days, that the lender may modify term, amortization, or down payment on any transaction, and that this form is not a commitment to lend.

☐ I have read and agree to the certification and credit authorization above.

Borrower signature | Borrower printed name | Date

Co-borrower / guarantor signature | Co-borrower / guarantor printed name | Date