

BASIC INFORMATION

Borrower First & Last Name:

Borrower Email:

Borrower Phone:

Property Type:

Loan Purpose:

Loan Amount:

Purchase Price or Market Value:

PROPERTY INCOME & EXPENSES

Are income and expenses on the property Actual or Proforma?:

Gross Annual Income:

Vacancy Factor (typically 5%):

Total Annual Operating Expenses (excluding mortgage & depreciation):

Net Operating Income (NOI):

Borrower Financials

BORROWER FINANCIALS

Estimated Credit Score:

Number of Properties Owned:

Total Value of All Real Estate Owned:

Total Cash Reserves (Checking & Savings):

Investment Assets (Stocks, Bonds, Life Insurance):

Personal Property (Autos, Furniture, Jewelry, etc.):

Other Business Owned – Estimated Value:

Total Mortgage Debt (All Properties):

Total Credit Card Debt:

Other Loans (Auto, Business, Personal):

Taxes & Bills Owed:

REFINANCE LOANS

Date Property Acquired:

Original Purchase Price:

Existing Loan Balance:

Purpose of Refinance (Summary):

Is there a prepayment penalty?

Yes No

Is the mortgage current?

Yes No

Cash-Out Amount Desired:

Existing Lender Name:

CapEx Summary (what has been completed):

Property Details

PROPERTY LOCATION & DETAILS

Street Address, City, State, Zip:

Total Units:

Number of Commercial Units:

Number of Residential Units:

Number of Section-8 Units (if applicable):

Building Square Footage:

Lot Size (SF, not acres):

Year Built:

Number of Floors:

Number of Buildings:

Any deferred maintenance?

Yes No

Any code violations?

Yes No

Current Occupancy (0%–100%):

Property Use (Investment or Owner-User):

Annual Property Taxes:

Annual Property Insurance:

Summary & Notes

SFR / PROPERTY FEATURES (IF APPLICABLE)

Bedrooms:

Bathrooms:

Garage Spaces:

Sponsor Bio / Resume:

MORE QUESTIONS

If CRE, how many leases are NNN?:

Exit Strategy / Hold Period:

Preferred Loan Type (Bridge, Permanent, Rehab, Ground-Up):

Institutional (lowest rate) or Private financing preferred?:

Can the borrower provide tax returns?

Yes No

FULL LOAN SUMMARY

Full Summary About Loan: