

Loan Intake Summary

****Please submit property financials including P&L/T-12, Borrower Proforma, and Current Rent Roll****

Applicant Name:

DOB: U.S. Citizen:

Address:

Contact Number: Email:

Borrowing Entity Name (if created yet):

List Members of borrowing entity and percentage breakdown of ownership, if applicable:

Have any of the sponsors filed bankruptcy within the last 5 years? Foreclosure, deed in lieu, or short sale in the past 3 years?

Do any of the sponsors have past or current felonies, pending litigation, or cases involving RE fraud?

Total Estimated Liquidity: Total Estimated Net Worth:

Total # of Properties Owned: Total # of Units Owned:

Deal Overview

Subject Property Address: Unit Count

Purchase or Refinance? Loan Program Type:

If Purchase, Purchase Price: \$ Contract Closing Date:

If Refi, Original Purchase Date: Original Purchase Price: Payoff Amt: \$

Are there any judgements or tax liens against the property?

If Value Add, please provide the estimated amount of construction/rehab funds that will be completed: \$

Please provide a brief description of what construction/rehab budget funds will be used for:

Current Rental Rates per unit type:

Estimated Rental Rates per unit type:

What is the exit strategy? Please reference property management, stabilization timeline, and refinance loan consideration:

Have any 3rd party reports been conducted recently on the property? (appraisal, environmental, etc.)