

BROKER INFORMATION			
Name	Company	Phone number	Email

PROPERTY INFORMATION				
Address		City	State	Zip
Building sq. ft	Number of units	Percent occupied	Does the owner occupy any portion of the building? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how many sq. ft.?

LOAN PROGRAM					
PERM PROGRAM (Indicate):		<input type="checkbox"/> Full Doc	<input type="checkbox"/> Lite Doc	Property type	Does the property have:
Forms required: <input type="checkbox"/> Current rent roll – (Yours or use the attached form) <input type="checkbox"/> Property operating statements – Last two years and YTD (Yours or use the attached form) <input type="checkbox"/> Purchase contract – (If the loan is for the purchase of property) <input type="checkbox"/> Tax returns – Last two years tax returns (If property is owner occupied)		<input type="checkbox"/> Multifamily <input type="checkbox"/> Retail <input type="checkbox"/> Mixed-use <input type="checkbox"/> Industrial <input type="checkbox"/> Office <input type="checkbox"/> Self-storage <input type="checkbox"/> Mobile home park		<input type="checkbox"/> Underground or above-ground storage tanks <input type="checkbox"/> Automotive repair uses <input type="checkbox"/> Ongoing environmental remediation <input type="checkbox"/> Hazardous material handling/licensing <input type="checkbox"/> On-site dry cleaner plant <input type="checkbox"/> A prior Phase 1 report available	

WHAT PERSON OR ENTITY OWNS THE PROPERTY?			
If entity owns property, list entity name			
LIST OWNER(S) OF ENTITY/COMPANY OR PROPERTY			
Name 1	% of ownership	Liquidity	
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	
Name 2	% of ownership	Liquidity	
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	
Name 3	% of ownership	Liquidity	
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	
Name 4	% of ownership	Liquidity	
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	
Have any borrowers or guarantors:		Yes	No
Had a property foreclosed in last 3 years?		<input type="checkbox"/>	<input type="checkbox"/>
Filed for bankruptcy in last 5 years?		<input type="checkbox"/>	<input type="checkbox"/>
Missed mortgage payments in last 12 months?		<input type="checkbox"/>	<input type="checkbox"/>
Failed to file federal tax returns for last 3 years?		<input type="checkbox"/>	<input type="checkbox"/>
Are an borrowers or guarantors a foreign national?		<input type="checkbox"/>	<input type="checkbox"/>
Are there back real estate taxes owed on subject property?		<input type="checkbox"/>	<input type="checkbox"/>
If "Yes" to any of the questions above, please attach a detailed Letter of Explanation.			

COMMENTS - OTHER PERTINENT INFORMATION ABOUT THE DEAL

LOAN INFORMATION		
Loan amount requested		
Desired rate	Amortization in months	
Current estimated value		
Monthly pmt	Annual pmt	
Annual gross income		
Annual operating expense		
Net operating income		
LTV	DSCR	CAP rate
<input type="checkbox"/> PURCHASE		1031 exchange? <input type="checkbox"/> Yes
Current sales price		
Target closing date		
<input type="checkbox"/> RATE AND TERM REFINANCE or <input type="checkbox"/> CASH-OUT REFINANCE		
Current loan balance	Current rate	
Loan maturity date		
Current lender		
Acquisition price	Mo/Yr acquired	
Estimated cash-out available		
If cash-out, please state what the funds will be used for:		Amount



COMMERCIAL RENT ROLL

For office, industrial, retail, mixed use

ALL COLUMNS AND SECTIONS MUST BE COMPLETED.

Rent Roll as of *(required)*: _____

PROPERTY ADDRESS						CITY			STATE	ZIP CODE	
STE #	TENANT'S NAME <small>(PUT VACANT FOR VACANT SPACE)</small>	SQ. FT. <small>(APPROX)</small>	CURRENT MONTH RENT IN PLACE	ORIGINAL OCCUPANCY DATE	CURRENT LEASE START DATE OR MTM	CURRENT LEASE EXPIRATION DATE	LEASE TYPE <small>(NNN, MOD. GROSS, GROSS)</small>	MONTHLY CAM CHARGES	NET RENT INCREASE <small>(MO / YR)</small>	NET RENT INCREASE AMT <small>(\$ / MO)</small>	EXTENSION OPTIONS? <small>(Y / N)</small>
TOTALS											

NOTES ON TENANTS

SIGNATURE

I (we) certify under penalty of perjury that the foregoing information herein is true and accurate.

_____ Date _____

Borrower

_____ Date _____

Borrower

ALL COLUMNS AND SECTIONS MUST BE COMPLETED.

Rent Roll as of (required): _____

PROPERTY ADDRESS				CITY				STATE	ZIP CODE	
TOTAL # OF UNITS	# OF VACANT UNITS	# OF FURNISHED UNITS	# OF UNFURNISHED UNITS	# OF SECTION 8 UNITS						
APT #	TENANT'S NAME	BDR/BATH	SQ. FT. (APPROX)	CURRENT RENT PER MO	ORIGINAL OCCUPANCY DATE	CURRENT LEASE EXPIRATION OR MTM	DATE OF LAST RENT INCREASE	FURNISHED UNIT (Y/N)	SECTION 8 (Y/N)	RENT CONCESSIONS (Y/N)
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* USE ADDITIONAL FORMS IF NECESSARY

MONTHLY RENT SCHEDULE	
MONTHLY LAUNDRY INCOME <small>(Must show on Income/Expenses)</small>	
MONTHLY GARAGE INCOME	
OTHER INCOME (specify below)	
TOTAL FROM OTHER PAGES	
TOTAL GROSS MONTHLY INCOME	

What utilities are included in rent?

Electricity	Cable TV	Gas
Garbage	Water	Heat

Is the property subject to rent control?

Yes No

If yes, what is the current allowable increase per year?

\$ _____

What has been your average monthly occupancy rate over the preceding 12 months?

_____ %

SIGNATURE

I (we) certify under penalty of perjury that the foregoing information herein is true and accurate.

Borrower

Date

Borrower

Date

PROPERTY ADDRESS	CITY	STATE	ZIP CODE

ANNUAL INCOME	2ND YEAR PRIOR	PRIOR YEAR	CURRENT YEAR	MOS.
Rental Income Collected				
Total Income Collected				

ANNUAL EXPENSES	2ND YEAR PRIOR	PRIOR YEAR	CURRENT YEAR	MOS.
<i>Do not include one time capital expense items</i>				
Real Estate Taxes				
Insurance				
UTILITIES				
Gas				
Electricity				
Water/Sewer				
Trash				
MAINTENANCE				
Pest Control				
Gardener				
Pool Service				
Elevator				
Cleaning Service				
Building Rep. & Maint.				
Painting & Decorating				
Supplies				
ADMINISTRATION				
Administrative				
Advertising				
Telephone				
MISCELLANEOUS				
Resident Manager				
Security				
Off-Site Management				
Other				
TOTAL EXPENSES				
NET OPERATING INCOME				

COMMENTS OR EXPLANATIONS