



TODAY'S DATE _____

Please provide initial documentation with loan submission. Initial documentation may consist of some or all of the following. Please don't hesitate in sending other relevant information.

- Current credit report on all borrowers
- 1003 signed and dated
- Copy of tax return (self & business)
- Rent roll
- YTD P&L
- Copy of appraisal
- Digital photos
- If purchase, copy of purchase contract

LOAN INFORMATION

Loan Purpose: Purchase Refinance Cash Out Refinance

Details of loan purpose: _____

Loan Amount: _____ If purchase, price: _____ Closing Date: _____

If refinance, mortgage payoff amount: _____ If cash out refinance, amount of cash out: _____

Purpose of cash out: _____

BORROWER'S INFORMATION

Borrower Type: Individual Corporation LLC Partnership Trust Other: _____

Business Name: _____

Borrower: _____ Credit Scores: _____
first middle last

Co-Borrower: _____ Credit Scores _____
first middle last

Borrower business type: _____

Borrower's annual income: _____ If self-employed, since when: _____



PROPERTY INFORMATION

If loan is on multiple properties, please send a Loan Submission Form for each additional property. Only borrower's name and property information is required for additional property submissions.

Property Type: Office Retail SFR Hotel Multi-Family Warehouse
 Mobile Home Park Vacant Lot Other: _____

Property Address: _____

Original Purchase Price: _____ Date: _____ Zoning: _____

Tax Parcel Numbers: _____ parcel 1 _____ parcel 2 _____ parcel 3 _____ parcel 4 _____ parcel 5

If appraised, date of appraisal: _____ Value: _____ Appraiser: _____

If not appraised, current estimated value: _____ Form of valuation: _____

Occupancy type: Owner Occupied 100% More than 50% Non-Owner Occupied

Number of rental units: _____ Number of units currently rented: _____ Total sqft of buildings: _____

What is the verifiable gross monthly rents collected for all occupied units: _____

Estimated annual operating expenses (taxes, insurance, utilities, repairs, management, etc.): _____

BROKER INFORMATION

Broker's Company: _____ Broker's Name: _____

Work Phone: _____ Cell Phone: _____ Fax: _____

If appraised, date of appraisal: _____ Value: _____ Appraiser: _____

Email: _____ Website: _____

Broker Fee: _____ Additional fees: _____ Explain: _____