

Referral Source: _____

BROKER INFORMATION																														
Name			Company			Phone number		Email																						
SUBJECT 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																														
CORE PROGRAM (Indicate): <input type="checkbox"/> Full Doc <input type="checkbox"/> Lite Doc <input type="checkbox"/> No Doc					Property type		Does the property have:																							
ELITE PROGRAM (Indicate): <input type="checkbox"/> Full Doc					<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"/> Single family pool (5+ units) <small>(Core Program Only)</small>		<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																							
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)																														
1-4 UNIT RESIDENTIAL RENTAL PROPERTY (Indicate): <input type="checkbox"/> No Doc					Property type																									
Forms required: <input type="checkbox"/> Current lease – (If occupied) <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"/> FNMA 1003 form – (If complete and available, send a 1003 or complete 1-4 Unit Borrower Application.)					<input type="checkbox"/> SFR <input type="checkbox"/> Condo/Townhome <input type="checkbox"/> Duplex <input type="checkbox"/> Triplex <input type="checkbox"/> Fourplex																									
WHAT PERSON OR ENTITY WILL OWN THE PROPERTY?					LOAN INFORMATION																									
If entity will own the property, list entity name					Loan amount requested																									
LIST OWNER(S) OF ENTITY/COMPANY OR PROPERTY					Desired rate	Amortization in months		YSP% rebate %																						
Name 1	% of ownership %	Liquidity	Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Current estimated value																								
Name 2	% of ownership %	Liquidity	Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Monthly pmt	Annual pmt																							
Name 3	% of ownership %	Liquidity	Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Annual gross income																								
Name 4	% of ownership %	Liquidity	Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Annual operating expense																								
Have any borrowers or guarantors: <table style="width:100%; border: none;"> <thead> <tr> <th style="width: 80%;"></th> <th style="width: 10%; text-align: center;">Yes</th> <th style="width: 10%; text-align: center;">No</th> </tr> </thead> <tbody> <tr> <td>Had a property foreclosed in last 3 years?</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Filed for bankruptcy in last 5 years?</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Missed mortgage payments in last 12 months?</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Failed to file federal tax returns for last 3 years?</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Are any borrowers or guarantors a foreign national?</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Are there back real estate taxes owed on subject property?</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>						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 any 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"/>	LTV	DSCR		CAP rate	
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If "Yes" to any of the questions above, please attach a detailed Letter of Explanation.					<input type="checkbox"/> PURCHASE 1031 exchange? <input type="checkbox"/> Yes																									
					<input type="checkbox"/> RATE AND TERM REFINANCE or <input type="checkbox"/> CASH-OUT REFINANCE																									
COMMENTS - OTHER PERTINENT INFORMATION ABOUT THE DEAL					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																										

PROPERTY OPERATING STATEMENT

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