



LOAN SUBMISSION FORM

For **Full Evaluation**, please include the following:

- Current Rent Roll/Lease Summary
- Borrower Financial Statement (Balance Sheet)
- Color Photographs (Exterior only)
- Current Income and Expense Statement (Purchase)
- Two Years of Operating History (Refinance)
- Executed Purchase Agreement (Purchase)

BROKER INFORMATION

Broker Name: _____ Phone: _____
 Company Name: _____ Fax: _____
 Company Address: _____ E-mail: _____
 City: _____ State: _____ Cellular: _____
 Zip: _____

LOAN REQUEST

Loan Request: \$ _____
 Purpose of Loan: Purchase Refinance
 Loan Program: 3 Year Fixed 5 Year Fixed Adjustable
 Broker Points (%): _____
 Broker Processing Fee(\$): _____

Refinance Transactions		Purchase Transactions	
Date Purchased:		Sales Price:	\$
Purchase Price:	\$	Down Payment:	\$
Existing 1st:	\$	Secondary Financing:	\$
Existing 2nd:	\$	Interest Rate:	
Requested Cash Out:	\$	Maturity Date:	
Use of Cash Out:		Amortization:	

PROPERTY INFORMATION

Property Type: MFR Retail Office Industrial Other _____
 Construction Type: Wood Frame/Stucco Reinforced Brick Concrete Block Concrete Tilt-up Metal
 Property Address: _____
 City: _____ State: _____
 Zip: _____
 Is subject property within 500 feet of a Commercial/Retail/Industrial property?
 Yes No (Required)
 # of Units: _____ Year Constructed: _____
 Net Rentable Area: _____ # of Parking Spaces/Garages: _____
 Land Area: _____ Year Renovated (If Applicable): _____
 Deferred Maintenance: Yes No Condition: Good Average Poor
 If yes, describe _____

APARTMENT UNIT MIX						
# of Units	Unit Type BR / BA		Average Square Feet	Actual Monthly Rent	Date Rent Last Increased	Units Vacant

Rent Control:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Pool:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Units Master Metered for Gas:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Laundry Room:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Units Master Metered for Electricity:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Laundry Hook-ups:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Units Master Metered for Water/Sewer:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Kitchens:	<input type="checkbox"/> Yes	<input type="checkbox"/> No

COMMERCIAL UNIT MIX								
Tenant	Net Rentable Area	Lease Start	Lease Expiration	Base Rent	Tenant Pays Tax (Y/N)	Tenant Pays Ins. (Y/N)	Tenant Pays CAM (Y/N)	Tenant Pays Janitorial (Y/N)

BORROWER INFORMATION									
Borrowing Entity:	_____								
Principals:	_____								
Borrower's Occupation:	_____								
Own Other Income Property:	<input type="checkbox"/> Yes <input type="checkbox"/> No								
If yes, how many:	_____								
Financial Information:	<table border="1"> <tr> <td>Foreclosures:</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td>Date:</td> <td>_____</td> </tr> <tr> <td>Bankruptcy:</td> <td><input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td>Date/Chapter:</td> <td>_____ / _____</td> </tr> </table>	Foreclosures:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date:	_____	Bankruptcy:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date/Chapter:	_____ / _____
Foreclosures:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date:	_____						
Bankruptcy:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Date/Chapter:	_____ / _____						
Borrower: _____	Borrower: _____								
As of (Date): _____	As of (Date): _____								
Liquid Assets: _____	Liquid Assets: _____								
Total Assets: _____	Total Assets: _____								
Total Liabilities: _____	Total Liabilities: _____								
Net Worth: _____	Net Worth: _____								

Do you (or does any partnership or company in which you hold a controlling interest) own real property that is or has been subject of an uncorrected violation, notice to comply, or other notice of citation relating to substandard or illegal conditions?

No Yes If yes, please explain _____

If this loan is sought for the purchase of real property, do you (or does any of your immediate family) have a direct or indirect financial interest in any of the following parties to the transaction: the seller, any existing mortgage holder, the escrow, any salesperson or brokerage firm?

No Yes If yes, please explain _____

CONTACT US	
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