

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:
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"/> Single family pool (5+ units)		<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
1-4 UNIT RESIDENTIAL RENTAL PROPERTY (Indicate): <input type="checkbox"/> Full Doc <input type="checkbox"/> Lite Doc <input type="checkbox"/> No Doc			Property type		Borrower must OWN and OCCUPY a SEPARATE residence of greater value than subject property and have owned investment real estate for at least one year.
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 <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	Current estimated value		
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Monthly pmt	Annual pmt	
Name 2	% of ownership %	Liquidity	Annual gross income		
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Annual operating expense		
Name 3	% of ownership %	Liquidity	Net operating income		
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	LTV	DSCR	CAP rate
Name 4	% of ownership %	Liquidity	<input type="checkbox"/> PURCHASE 1031 exchange? <input type="checkbox"/> Yes		
Personal residence address – Owns residence? <input type="checkbox"/> Yes	Credit score	Net worth	Current sales price		
Have any borrowers or guarantors: Yes Had a property foreclosed in last 3 years? <input type="checkbox"/> Filed for bankruptcy in last 5 years? <input type="checkbox"/> Missed mortgage payments in last 12 months? <input type="checkbox"/> Failed to file federal tax returns for last 3 years? <input type="checkbox"/> Are an borrowers or guarantors a foreign national? <input type="checkbox"/> Are there back real estate taxes owed on subject property? <input type="checkbox"/> If "Yes" to any of the questions above, please attach a detailed Letter of Explanation.			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			
COMMENTS - OTHER PERTINENT INFORMATION ABOUT THE DEAL					

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