



EXECUTIVE SUMMARY WORKSHEET

Please complete the following information before submitting your loan request. If a field is not applicable, please indicate "N/A" in the appropriate space. **BE HONEST AND TRANSPARENT WHEN DIVULGING ALL INFORMATION TO US DURING THIS PROCESS. ATTEMPTING TO MISLEAD OR HIDE ANY PERTINENT INFORMATION IS GROUNDS FOR IMMEDIATE DENIAL OF YOUR LOAN REQUEST.**

PROJECT OVERVIEW	
Type of Financing Requested: (check all applicable)	<input type="checkbox"/> Residential <input type="checkbox"/> Commercial <input type="checkbox"/> Residential/Commercial/Mixed-Use <input type="checkbox"/> Fix-&-Flip <input type="checkbox"/> Buy-&-Hold <input type="checkbox"/> Purchase <input type="checkbox"/> Refi (cash-out) <input type="checkbox"/> Refi (rate/term) <input type="checkbox"/> Construction (ground-up) <input type="checkbox"/> Acquisition <input type="checkbox"/> Development <input type="checkbox"/> Bridge <input type="checkbox"/> LOC <input type="checkbox"/> Debt/Equity <input type="checkbox"/> Private Money <input type="checkbox"/> Other (specify) _____
Project Location & Address:	
Brief Overview of Loan Request:	
Brief Description of Property Type:	
How Many Units? How Many Parcels?	
Loan Amount Requested:	\$ _____
Purchase Price (if Refi, original purchase price):	\$ _____
Down Payment (Cash Available):	\$ _____ (if refi, original down payment)
Current As-Is Property Value:	\$ _____
Estimated Rehab Costs:	\$ _____ (if applicable)
Estimated After Repair Value (ARV):	\$ _____ (or after completion value if appropriate)
Amount of debts or liens on property?	\$ _____
If Refi, current rate and term:	
Requested Closing Date?	
Is Property Currently in Foreclosure?	Yes _____ No _____
Detailed Use of Funds:	
Exit Strategy (if applicable):	
NOI of Property:	
% Tenant Occupancy:	
% Owner Occupancy:	



BORROWER INFORMATION

Borrower(s) Name: Address: Email Address: Cell Phone Number:	
Key Principal(s) and Ownership %:	
Background and Overview of Key Principal(s):	
Years in industry: Number of years in Business:	
# of Rental Properties Held Currently:	
Projects Completed in last 2 years/ Currently in Progress:	
Who Will Guarantee the Loan?	
Net Worth of Guarantor(s):	
Liquidity of Guarantor(s): (Stocks, Bonds, Equity, Cash)	
3 Credit Scores of Guarantor(s):	
Are Any Borrowers in Bankruptcy?	Yes _____ No _____
Other Available Assets to Secure Funding:	

FURTHER PROJECT DETAILS

Have You Had Any Difficulty Obtaining Funding For This Project Through Other Lenders? (If so, please describe the reason(s) why the loan was declined.)	
Provide any other information/ details relevant to the project which you think will aid us in funding this project:	