



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 Project:	
How Many Units? How Many Parcels?	
Loan Amount Requested:	\$ _____
Land Acquisition Cost (if owned, original purchase price):	\$ _____
Down Payment (Cash Available):	\$ _____ (if refi, original down payment)
Current As-Is Property Value:	\$ _____
Estimated Soft Costs:	\$ _____ completed _____ to be completed
Estimated Contingency:	\$ _____ (or after completion value if appropriate)
Cost of Improvements (infrastructure):	\$ _____
After Improved Value:	\$ _____
Amount of debts or liens on property?	\$ _____
Total Construction Costs:	\$ _____
Total Project Value After Completion:	\$ _____
Exit Strategy:	
Construction Timeline:	
Name/Experience of Person(s) Handling the Rehab/Construction:	



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:	