



# 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. *PLEASE 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	
<b>Type of Financing Requested:</b> (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) _____
<b>Project Location &amp; Address:</b>	
<b>Brief Overview of Loan Request:</b>	
<b>Brief Description of Property Type:</b>	
Date Built: How Many Units? How Many Parcels?	
<b>Loan Amount Requested:</b>	\$ _____
<b>Purchase Price (if Refi, original purchase price):</b>	\$ _____
<b>Down Payment (Cash Available):</b>	\$ _____ (if refi, original down payment)
<b>Current As-Is Property Value:</b>	\$ _____
<b>Estimated Rehab Costs:</b>	\$ _____
<b>Estimated After Repair Value (ARV):</b>	\$ _____ ( or after completion value if appropriate)
<b>Amount of debts or liens on project?</b>	\$ _____
<b>Detailed Use of Funds:</b>	
<b>Exit Strategy:</b>	
<b>Date Funding is Needed?</b>	
<b>Is Property Currently in Foreclosure?</b>	Yes _____ No _____
<b>Rehab / Construction Timeline:</b>	
<b>Name/Experience of Person(s) Handling the Rehab/Construction:</b>	



**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:	