



## LOAN REQUEST SUMMARY

Date: \_\_\_\_\_

Name of Borrower(s):  
\_\_\_\_\_  
\_\_\_\_\_

Borrower's Address:  
\_\_\_\_\_  
\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_

Borrower's:

Phone (office): \_\_\_\_\_ Cell: \_\_\_\_\_

Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**Borrowing Entity:** \_\_\_\_\_Corporation \_\_\_\_\_LLC \_\_\_\_\_Partnership  
**General Partnership:** List all general partners.  
**Limited Partnership:** List all general partners and any limited partners with an interest of 20% or more (specify managing general partners).  
**Corporation:** List all shareholders or beneficiaries owning 20% or more of the corporation's stock. Indicate the percentage or number of shares owned.  
 Indicate the percentage interest or number of shares owned in the "Interest %" column.

Name	Role (LP/GP/ Pres)	Interest %

**Property Address:**

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**Property Description** (Check appropriate category):

\_\_\_ Mixed Use

\_\_\_ Retail

\_\_\_ Medical Office

\_\_\_ Industrial/Warehouse

\_\_\_ Hotel/Motel

\_\_\_ Office

\_\_\_ Mobile Home Park

\_\_\_ Mini Storage

\_\_\_ Land

\_\_\_ Other

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**Estimated Value:** \$ \_\_\_\_\_

**Loan Amount:** \$ \_\_\_\_\_

**Acquisition?** \_\_\_\_\_

**Refinance?** \_\_\_\_\_

If **acquisition**, what is the purchase price?

\$ \_\_\_\_\_

Borrower down payment:

\$ \_\_\_\_\_

If **refinance**, what was the date of acquisition?

\_\_\_\_\_

What was the original purchase price?

\$ \_\_\_\_\_

How much cash has Borrower put in?

\$ \_\_\_\_\_

**Purpose of Refinance:**

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Is current loan(s) in foreclosure? \_\_\_\_\_

Is Borrower in bankruptcy? \_\_\_\_\_

If so, explain situation:(feel free to attach a continuation sheet)

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Current Debt	Mortgagee	Current Balance	Maturity Date	Rate	Recourse (Yes / No)
1 <sup>st</sup> Mortgage					
2 <sup>nd</sup> Mortgage					
Other					
Other					

**Sources and Uses of Funds:**

Sources		
Loan Amount	\$	
Borrower Cash	\$	Source:
Additional Sources	\$	Source:
<b>Total Sources</b>	\$	
Uses		
Existing First Mortgage	\$	Lender:
Existing Second Mortgage	\$	Lender:
Capital Improvements	\$	
Closing Costs	\$	
Other	\$	Description:
<b>Total Uses</b>	\$	

**What is the exit strategy for this loan?**

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**Has this loan been shopped to other lenders? If so, to what lender(s) and what is the status?**

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**Are there commitments made by other lenders? If so, who?**

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Broker/Consultant submitting this summary:

\_\_\_\_\_

Email: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

*Please include personal financial statements with all requests.*

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**If we feel your loan request meets our lenders criteria, we will require additional information sent to our office**

**Please be advised that misinformation or erroneous information will be grounds for denial.**

**\*\*\*For income-producing properties provide current and prospective rent roll on separate Excel spreadsheet\*\*\***

**\*\*\* Include income and expense report statement for the past two (2) years and year-to-date \*\*\***