



Bridging the Gap Between Bank and Private Commercial Financing

Loan Submission Form

Date: _____ Loan Originator: _____ L O Email: _____ LO Phone: _____

Borrower Rate & Term Expectations: _____ Borrower / File Name: _____

Loan Amt: \$ _____ Rate: _____ Term: _____ LTV: _____ Originator's Fee (Pts): _____

Borrower Experience

1. Total No. prior RE Investments Completed: _____
2. No. RE Inv. Properties purchased last 12 months: _____
3. No. of Fix/Flip properties sold in the last 24 months: _____
4. Liquid cash available to Invest: \$ _____
5. No. Investment properties you currently own? _____
6. Describe investments experience and in which markets you are active: _____

Project Overview

1. Purchase: ___ or Refi: ___ Cashout: \$ _____
2. Required Closing Date: _____
3. Property Address: _____

4. Property Type: ex. SFR, 4-plex: _____
5. Property Rented: _____ \$/Mo:\$ _____
6. Exit Strategy: ex. Sale or Refi: _____
7. Is subject property located within 30 minutes of your home or current/past investments? _____
8. Purchase Price: \$ _____
9. Renovation Cost: \$ _____
10. Repairs Completed / \$: _____
11. After Renovation Value (ARV): \$ _____
12. Renovations to be completed: _____

13. How did you arrive at your Renovation budget: _____

14. Have you been inside the property: _____
15. Can we obtain interior access: _____
16. Well or septic system: _____
17. Are you aware of any oil tanks, mold, or current/historical environmental issues: _____
18. Have you listed the property for sale: _____

Borrower Info

1. Borrower Name: _____
2. Home Address: _____
3. Own or Rent: _____ 4. Date of Birth: _____ - _____ - _____
5. Social Security #: _____
6. Middle Credit Score: _____ 7. Self Employed: _____
8. Occupation: _____
9. Employer Name: _____
10. Number of years with employer: _____
11. Email Address: _____
12. Business Phone: _____
13. Total Annual Income: _____
14. Checking / Savings Acct.: \$ _____
15. Retirement / Brokerage Accts.: \$ _____

Investment Properties

1. No. of Investment Properties Currently Owned: _____
2. Current value of Investment Properties Owned: _____
3. Existing mortgage(s) on investment properties: _____
4. Annual Gross Rental Income: \$ _____
5. Annual Expenses (Taxes, Ins, etc): \$ _____
6. Annual Mortgage Payments: \$ _____
7. Attach SREO w/ _____ No. of Properties w/ Purchase Date, Price, Loan Bal., Mtg Pmts, Taxes, Ins., Rental Income

Entity Info

1. Entity Type: Inc. LLC, LP, Trust: _____ Entity Name: _____
2. EIN / TIN #: _____
3. Managing Partner / Primary Signer # 1
 - a. Full Name: _____
 - b. % Ownership: _____
 - c. Title: _____



Tailored Commercial Real Estate Financing and Trust Deeds

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