



**BORROWER OBJECTIVE**

**PROPERTY INFORMATION**

Address \_\_\_\_\_  
 Property Type  SFR  MF # Units \_\_\_\_\_  Commercial: Type \_\_\_\_\_  Other \_\_\_\_\_  
 Loan Type  Purchase  Refi  Cash Out Refi  
 Value Add  None  Light  Heavy  Repurpose  Ground-Up  
*For cash flowing properties:*  
 Gross Income: \$ \_\_\_\_\_ Expenses: \$ \_\_\_\_\_ NOI: \$ \_\_\_\_\_  
 Details if Stabilization Required: \_\_\_\_\_

**LOAN REQUEST**

Desired Loan Amount: \$ \_\_\_\_\_ Loan Term: \_\_\_\_\_ (months)  
 Initial Advance: \$ \_\_\_\_\_ Control Fund: \$ \_\_\_\_\_  
 Expectations for cost of capital, broker fee, and closing date \_\_\_\_\_

**VALUES**

Purchase Price: \$ \_\_\_\_\_ Purchase Date: \_\_\_\_\_ Improvements since Acquired: \$ \_\_\_\_\_  
 Current Value: \$ \_\_\_\_\_ Prior appraisals?: \_\_\_\_\_  
 LIENS Existing 1st: \$ \_\_\_\_\_ Existing 2nd: \$ \_\_\_\_\_  
 Cash Equity: \$ \_\_\_\_\_

**BORROWER INFORMATION**

Borrower Name \_\_\_\_\_ Borrower Email \_\_\_\_\_  
 Annual Income: \$ \_\_\_\_\_ Liquid Assets: \$ \_\_\_\_\_ Net Worth: \$ \_\_\_\_\_ Mid FICO: \_\_\_\_\_  
 Any Bankruptcies?: \_\_\_\_\_ Any Foreclosures?: \_\_\_\_\_ Defaults?: \_\_\_\_\_  
 US Citizen?: \_\_\_\_\_ Any felonies?: \_\_\_\_\_  
 Borrowing Entity Name and Address: \_\_\_\_\_

**BORROWER EXPERIENCE**

**USE OF FUNDS**

**EXIT STRATEGY**

Internal Use Only

Application \_\_\_\_\_ Borrower \_\_\_\_\_ Experience \_\_\_\_\_ Location \_\_\_\_\_ Liquidity \_\_\_\_\_ Value \_\_\_\_\_  
 Amount \_\_\_\_\_ Rate \_\_\_\_\_ Term \_\_\_\_\_ Pts \_\_\_\_\_ LTV \_\_\_\_\_ PPP \_\_\_\_\_ DD \_\_\_\_\_  
 Docusign \_\_\_\_\_ Borrower Direct \_\_\_\_\_ Welcome Call \_\_\_\_\_