

Private Money / Bridge Loan Summary

Please provide the following information and send by e-mail or fax so we can structure your transaction and financing options. You may provide alternative documentation or your own executive summary, or simply just the property information. (See checklist below) Please include photos.

Broker Contact: _____ E-Mail: _____

Company: _____

Phone: _____ Ext: _____ Fax: _____

Project Name: _____

Property Address: _____

Borrowing Entity: _____

Individuals: _____

LOAN QUOTE FORM / TRANSACTION SUMMARY

ESTIMATED VALUE / SALES PRICE \$ _____ Purchase Refinance

REQUESTED LOAN AMOUNT 1ST TD \$ _____ (* For refinance only)

*ACQUISITION DATE _____ *ORIGINAL PRICE \$ _____

*EXISTING FINANCING 1ST TD \$ _____ (Name of Lender) _____

*EXISTING FINANCING 2ND TD \$ _____ (Name of Lender) _____

*EXISTING FINANCING 3RD TD \$ _____ (Name of Lender) _____

COMMENTS: _____

WHAT IS THE STORY?

WHAT IS THE PURPOSE OF THE LOAN?

PROPERTY DESCRIPTION / WHAT TYPE OF PROPERTY IS THIS?

WHAT IS THE EXIT STRATEGY TO PAYOFF YOUR LOAN?

COMMERCIAL PROPERTY QUESTIONNAIRE

What is the property used for? _____

How many years of experience does the owner have in their business? _____

Is this a single tenant or multi-tenant property? _____

If a multi-tenant, how many tenants or units? _____ What is the year built? _____

What is the Gross Building area of the property? _____ (Estimate of total square feet)

How much of the total space is owner-user? _____

What is the potential market rent for the owner-user space? \$ _____ (If available)

If multi-tenant, what type of leases are being utilized? _____ (Gross, Net, etc.)

Who pays what expenses? _____

INCOME & EXPENSE (If Applicable for Income Property)

Total Number of Units / Suites: _____	Annual Operating Expenses	
Total # Vacant Units / Suites: _____	Taxes	_____
	Insurance	_____
*Total Current Monthly Income: \$ _____	Utilities	\$ _____
Laundry: \$ _____	Trash	\$ _____
Other: _____ \$ _____	Repairs/Maint	\$ _____
Other: _____ \$ _____	Administration	\$ _____
Other: _____ \$ _____	Management	\$ _____
Total Monthly Income: \$ _____	Janitorial	\$ _____
Total Annual Potential Income \$ _____	Gardening	\$ _____
	<u>Management</u>	\$ _____
	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
	_____	\$ _____
	Total:	\$ _____

*Include potential income for any vacant units / suites; 100% occupancy.

Submission Checklist for Income Property Request:
Please complete this form or provide your own executive summary.

Color photos (Front, rear, parking areas and street scenes)

Borrower Financial Statement (Borrowing Entity and all applicable individuals)

Copy of Borrower's Schedule of Real Estate

Multifamily (5 or more Apartment Units):
 Detailed Rent Roll (tenant name, rent, unit mix and move in date)
 Income & Expense Operating History Statements (Two past years and current YTD)

Commercial & Industrial:
 Detailed Lease Summary (tenant name, rent, square feet, move in date and lease expiration)
 Income & Expense Operating History Statement (Two past years and current YTD)

NOTE: We have custom Loan Quote forms to suit the following property types: Apartments, Mixed Use, Commercial & Industrial (owner user or investor), Self Storage, Hotel and Assisted Living facilities.

All Property and application forms available upon request.