

Financing Overview Form

Property Name	LOAN AMOUNT REQUESTED \$ _____	Loan-To-Value % _____	AMORTIZATION MOS _____	TERM MOS _____	TYPE (IE: 3-yr, 5-yr) <input type="checkbox"/> ARM <input type="checkbox"/> Fixed
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BORROWER INFORMATION

BORROWING ENTITY WILL BE: _____

INDIVIDUAL(S) CORPORATION TRUST PARTNERSHIP: LIMITED GENERAL JOINT VENTURE OTHER: _____

PRINCIPALS: NAME	TITLE / POSITION	EQUITY INVESTED	OWNERSHIP %	CREDIT SCORE
_____	_____	\$ _____	% _____	_____
_____	_____	\$ _____	% _____	_____
_____	_____	\$ _____	% _____	_____
_____	_____	\$ _____	% _____	_____

HAS ANY BORROWER OR PRINCIPAL BEEN A PARTY TO A BANKRUPTCY, FORECLOSURE, LOAN DEFAULT, LAWSUIT OR JUDGEMENT? YES NO IF YES, PLEASE ATTACH A DETAILED EXPLANATION/DESCRIPTION.

HAS ANY BORROWER BEEN LATE IN PAYING MORTGAGE PAYMENTS OR TAX OBLIGATIONS IN THE PAST 7-YEARS? YES NO
PLEASE PROVIDE A SEPARATE EXPLANATION PAGE IF MORTGAGES WERE LATE, OR OTHER DEROGATORY CREDIT IS SIGNIFICANT.

MAIN CONTACT: _____ PHONE NO. _____

ORIGINATOR/SOURCE: _____ PHONE NO. _____

PURCHASE OF SUBJECT PROPERTY

SALES PRICE \$ _____	CASH DOWN PAYMENT \$ _____	SOURCE OF DOWN PAYMENT (CASH DOWN AND/OR OTHER - EXPLAIN): _____			
ADD'L Lien - AMOUNT \$ _____	Add'l Lien - INTEREST RATE _____	Add'l Lien - MONTHLY P&I PAYMENT _____	Add'l lien TERM MOS _____	Add'l Lien - LENDER NAME: _____	

REFINANCE OF SUBJECT PROPERTY

DATE ACQUIRED _____	ORIGINAL PURCHASE PRICE \$ _____	AMOUNT OF EXISTING LIENS \$ _____			
FUNDS TO BE USED TO PAY:					
LENDER NAME	LIEN BALANCE	CURRENT PAYMENT	INTEREST RATE	MATURITY DATE	LIEN POSITION
_____	\$ _____	\$ _____	_____	_____	_____
_____	\$ _____	\$ _____	_____	_____	_____

REMAINING FUNDS TO BE USED FOR: _____

SUBJECT PROPERTY INFORMATION

STREET ADDRESS	CITY	COUNTY	STATE	ZIP CODE			
SITE SQ. FT.	RENTABLE SQ. FT.	# BUILDINGS	# STORIES	# UNITS	# PKG. SPACES	YEAR BUILT	
OCCUPANCY OVER THE PAST 12 MONTHS:			PROPERTY VALUE \$ _____	DATE OF LAST APPRAISAL _____			
DESCRIBE SIGNIFICANT REPAIRS AND/OR IMPROVEMENTS MADE TO THE PROPERTY RECENTLY:			Individually metered for electricity?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Complete Date Description Cost			City utilities for water & sewer?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
_____	_____	_____	Copper-based branch wiring?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
_____	_____	_____	Property use the same as when built (IE: Apts)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
_____	_____	_____	If multiple land parcels, are all contiguous?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
			Multifamily ONLY				
			UNIT MIX	Unit Count	Ave Sq Ft.	Rental Rate	# Vacant
			STUDIO/EFF	_____	_____	_____	_____
			1BR/1BA	_____	_____	_____	_____
			2BR/1BA	_____	_____	_____	_____
			2BR/2BA	_____	_____	_____	_____
			Other _____	_____	_____	_____	_____
DESCRIBE SIGNIFICANT REPAIRS AND/OR IMPROVEMENTS THAT THE PROPERTY CURRENTLY NEEDS:			# OF TENANTS (IF ANY) WITH SUBSIDIZED RENT?				
Timeline for Completion Description Cost							
_____	_____	\$ _____					
_____	_____	\$ _____					
_____	_____	\$ _____					
_____	_____	\$ _____					
MANAGEMENT WILL BE HELD BY:			MANAGER'S ADDRESS:		MANAGER'S PHONE NUMBER		

I/We are applying for a commercial loan. I/We understand that the information provided in this form will be relied upon to make an INITIAL determination if this loan is eligible for the lenders current lending guidelines, and that incorrect or missing information may result in the loan being declined.

Principal Borrower Signature _____

Typed or Printed Name _____

Date _____