***EXECUTIVE SUMMARY***

Press: CTRL A / Press F9 / Answer questions to fill in Form

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| --- | --- |
| **Principal Borrowers Name(s)** |  |
| Principle’s Mailing Address |  |
| Contact Phone Number |  |
| Occupation-Borrower |  |
| Industry Experience |  |
| Email Address |  |
| Borrower’s Credit & FICO’s |  |
| Borrower’s Net Worth |  |
| **Entity Name (i.e. Corp or LLC)** |  |
| **Project Name** |  |
| Property Address: |  |
| Entity Mailing Address |  |
| Webpage: |  |
| Type of Property |  |
| Age of Property |  |
| Types of services offered |  |
| Branded or Unbranded? |  |
| Year Purchased (refi only) |  |
| Original Purchase price or Contract Price |  |
| Estimated Current Market Value |  |
| Date and Value of Last Appraisal |  |
| **Loan Amount Requested** |  |
| Purpose of Loan: Purchase/ Refi/ Construction/ Other |  |
| Construction Cost/Budget |  |
| Down Payment (Non Borrowed) |  |
| Borrower’s equity in property |  |
| LTV requested |  |
| Any Environmental issues? Date of last Phase 1 or II |  |
| Sq Ft/Acres/No of Beds/ Floors/Units |  |
| Investment or Owner Occupied |  |
| Amt of any capital improvements in past 3 years |  |
| Current Mortgages on property |  |
| Net Operating Income (proj) |  |
| Debt Service Coverage (DSC) |  |
| Type of Financing requested: SBA / Conventional / USDA/ Hard Money |  |
| Interest Rate requested |  |
| Loan term and Amortization Period |  |
| Please provide a detailed scheduling of “use of proceeds” |  |
| Recourse or Non-recourse Loan |  |
| Amt Borrower invested to date in property |  |
| Has Loan been submitted to other lenders? Their Name |  |
| Has Loan Been previously turned down? Details |  |
| *Summarize Details of the project and what you are looking to accomplish with this loan, include: any special issues; problems, needs or anything that might affect the loan* |  |
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