

# Summary Sheet

Date \_\_\_\_\_

Borrowers' Name/Entity \_\_\_\_\_

Broker: \_\_\_\_\_ Fee requested: \_\_\_\_\_

Telephone #: Business \_\_\_\_\_ Mobile \_\_\_\_\_

Email \_\_\_\_\_

## Property Information

Address: \_\_\_\_\_

\_\_\_\_\_  
City County State Zip Code

APN# \_\_\_\_\_

Lot Size: \_\_\_\_\_

Building Size: \_\_\_\_\_

SFR  Multi  Commercial  Industrial  Land Development

New Construction  Remodeling/Addition

Other/Explain \_\_\_\_\_

Purchase  Refinance  Estimated Value \_\_\_\_\_

Requested Loan Amount:	Estimated LTV:
Purchase Price:	Date of Purchase:
Current Appraisal: Yes ___ No ___	

Lien (1) \_\_\_\_\_ Lender: \_\_\_\_\_ Loan #: \_\_\_\_\_

Due on: \_\_\_\_\_ Interest Rate \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Lender's Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Lien (2) \_\_\_\_\_ Lender: \_\_\_\_\_ Loan #: \_\_\_\_\_

Due on: \_\_\_\_\_ Interest Rate \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Lender's Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Lien (3) \_\_\_\_\_ Lender: \_\_\_\_\_ Loan #: \_\_\_\_\_

Due on: \_\_\_\_\_ Interest Rate \_\_\_\_\_ Contact Phone: \_\_\_\_\_

**Lender's Email:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**What is the purpose of the loan?** \_\_\_\_\_

\_\_\_\_\_

**What is Borrowers' credit like?** \_\_\_\_\_

**What is the income of the property?** \_\_\_\_\_

**Is it a rental or owner Occupied?** \_\_\_\_\_

**Documentation:**

**Do you have Tax Returns?** \_\_\_\_\_

**Current P&L:** \_\_\_\_\_

**Signed Leases:** \_\_\_\_\_

**Exit strategy:** \_\_\_\_\_

**Other properties owned?** \_\_\_\_\_

\_\_\_\_\_

**Is a 1003 included with this submission?** \_\_\_\_\_

**Explain what is the Borrowers' intent (no more than 5 readable sentences):**

**Presented By:** \_\_\_\_\_ **On** \_\_\_\_\_