

# Project Overview



Project Name \_\_\_\_\_ Date: \_\_\_\_\_

## Company Information

Business Name: \_\_\_\_\_ Tax Identification Number: \_\_\_\_\_  
Address: \_\_\_\_\_ Occupational License Type: \_\_\_\_\_  
City: \_\_\_\_\_ Fed ID Number: \_\_\_\_\_  
State: \_\_\_\_\_ Zip: \_\_\_\_\_ Date Business Formed: \_\_\_\_\_  
Years Business Owned: \_\_\_\_\_ Owned by Guarantor: \_\_\_\_\_ %  
Corporation  LLC  LP/LLP  S Corporation  Individual (s)   
Partnership  Other \_\_\_\_\_

## Borrower Contact Information

Applicant Name: \_\_\_\_\_  
Applicant Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone # \_\_\_\_\_ Borrowers Credit Score: \_\_\_\_\_  
Fax # \_\_\_\_\_  
Cell Phone # \_\_\_\_\_ Experience-Number of Years: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ SS # \_\_\_\_\_  
E-mail Address: \_\_\_\_\_

## Co-Borrower Contact Information

Applicant Name: \_\_\_\_\_  
Applicant Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone # \_\_\_\_\_ Borrowers Credit Score: \_\_\_\_\_  
Fax # \_\_\_\_\_  
Cell Phone # \_\_\_\_\_ Experience-Number of Years: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_ SS # \_\_\_\_\_  
E-mail Address: \_\_\_\_\_

## Loan Information

Loan Amount: \$ \_\_\_\_\_

Full Doc

Stated

Purpose:

Purchase  Refinance

LTV \_\_\_\_\_ % LTC \_\_\_\_\_ %

Construction  Cash Out

Money to Secure Project: \$ \_\_\_\_\_

New Const.  Refurbish

Appraised Value: \$ \_\_\_\_\_

Development  Rehab

Total Project Costs: \$ \_\_\_\_\_

Rate/Term Refi

# Project Overview



## Term:

S/Term  15 yr  20 yr   
25 yr  30 yr  Others: \_\_\_\_\_

## Rate Program:

Fixed  Adjustable   
Balloon

CIRCLE ONE

Type: 2yr, 5yr, 10yr

## Property Type:

Multi Family  Mixed Use  Self Storage  Bed & Breakfast   
Office  Retail  Mobile Home Park  Light Industrial   
Other: \_\_\_\_\_

Estimated Value of Real Estate: \$ \_\_\_\_\_

Owner Occupied: Yes  No  Square Feet \_\_\_\_\_ Tenant List Available Yes  No

Number of Units: \_\_\_\_\_ Number Occupied: \_\_\_\_\_

## If Mixed Use:

Number of Res Units: \_\_\_\_\_ Total Rent: \$ \_\_\_\_\_  
Number of Com'l Units \_\_\_\_\_ Total Rent: \$ \_\_\_\_\_

How will the property be managed? Self Managed  Management Company

## Current debt against the property:

1<sup>st</sup> Mortgage \$ \_\_\_\_\_ 2<sup>nd</sup> Mortgage \$ \_\_\_\_\_ 3<sup>rd</sup> Mortgage \$ \_\_\_\_\_

Liens or back taxes owed against this property: \$ \_\_\_\_\_

Prior Turn Down (if applicable, please explain why financing could not be obtained)

\_\_\_\_\_  
\_\_\_\_\_

## Purchase Information:

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Date of Purchase: \_\_\_\_\_ Borrower/Company Investment \$ \_\_\_\_\_

Purchase Price: \$ \_\_\_\_\_

Current Market Value: \$ \_\_\_\_\_ Original Cost: \$ \_\_\_\_\_

Spec  Custom  Owner Builder

Other: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_