



Please complete all relevant fields below (If N/A, Leave Blank or Put 0)

Blue questions are priority, Grey are helpful but not always required

Subject Property Address	
Borrower First And Last Name	
Phone Number	
Email Address	
Estimated Credit Score	
Transaction Type	
Property Type	
# Of Units	
# Of Units Occupied	
Estimated Property Value	
Purchase Price	
Current Monthly Rent	
Projected Rent (Fair Market Rent)	
Annual Taxes	
Annual Insurance	
Monthly HOA Fees (If Applicable)	
# of Investment Properties Owned Currently	
Liquidity	
Net Worth	
Citizenship	
Entity Name	
Earnest Money Deposit (If Purchase)	
Do you own a Primary Residence?	
Years Of Experience (Years since oldest rental currently owned)	
Owner Occupied? If So, List SQF in Notes?	
Total Square Footage	
Average Short Term Rental Monthly Rent	
Notes	

Complete If Refinance:	
Date of Acquisition	
Cost Of Improvements Completed	
Existing Lien Amount	
Who holds the current mortgage	
Current Rate	
When does the current mortgage mature?	
If 5+ Units / Commercial Property	
# Of 5+ unit Or Commercial Properties Owned	
# Of Units For 3 Largest Properties Owned (Ex. 45,12,3)	
What percentage of total Square footage is Commercial Use	
Borrower Preferences	
Preferred Loan Program	~ Select ~
Preferred Doc Type	~ Select ~
Preferred Prepay Penalty	~Select~
Requested LTV / LTC	
Rate Buydowns	~Select~

Closing Date	
Lead Source	

Partner Info (If Applicable)	
Co-Borrower Name	
Phone Number	
Email address	
Estimated Credit Score	
Liquidity	
Net Worth	
Citizenship	~ Select ~
# of Rental Properties Owned	
# Of Completed Commercial Deals	
# Of Units For 3 Largest Completed Deals	
Percentage of Entity Ownership	
Guarantor?	~Select~
Do you own a Primary Residence?	
Years Of Experience	

Broker Info (If Applicable)	
Company Name	
First And Last Name	
Email Address	
Phone Number	
Broker Points	

