



Loan Proposal Summary

Date: ___ / ___ / _____

From: _____ Company: _____

Phone: _____ Mobile: _____ Fax: _____ Email: _____

Borrower: _____ Credit Score: _____

Loan Amount: \$ _____ LTV: _____ % CLTV: _____ % Closing Date: _____

Purchase Price (if purchase): \$ _____ Value (if refi): \$ _____

Date Acquired (if refi): ___ / ___ / ___ Original Cost (Refi): _____

Terms Requested: Rate: _____ Term: _____ Fix: _____ Adj: _____

Property Address: _____

City: _____ State: _____ Zip Code: _____

Occupancy: Owner Occupied / Business: _____ N/O/O Occupied / Business: _____

Property Type: 9+ Units: _____ Warehouse/Office: _____ Mix Use: _____ Industrial: _____
Retail: _____ Tell us if not listed: _____

Purchase: _____ Rehab: _____ Rate & Term Refi: _____ Cash Out Refi: _____

Stated Doc: _____ Full Doc: _____

What is the purpose or goal for the property:

What is your required Return On Investment (ROI)?:

General Description of Deal/Comments:

