

Existing Income Property Refi

Name of Borrowing Entity: _____

1. Address of **Property**: _____

2. **Your** name & phone #: _____

3. Name(s) of principal(s)	% Ownership	Net Worth	Liquidity	3 Credit Scores
_____	_____ %	\$ _____	\$ _____	_____
_____	_____ %	\$ _____	\$ _____	_____
_____	_____ %	\$ _____	\$ _____	_____

Please attach signed, **FULLY COMPLETED**, current personal financial statement(s) if available.

4. Borrower's experience with this property type: _____

5. How much ACTUAL CASH investment will Borrower have in the property AFTER this refinance? _____

6. What is the total project cost and when was it bought/built? _____

7. What is Borrower's value estimate of primary collateral AS IS: \$ _____ AFTER ANY REHAB: \$ _____

8. What is Borrower's value estimate of any secondary collateral that is available? \$ _____

Describe any secondary collateral that is available: _____

9. Loan request amount/rate/terms: _____

10. LTV AS IS based on primary collateral ONLY: _____ LTV AS IS including secondary collateral: _____

11. LTV AFTER rehab on primary collateral ONLY: _____ LTV AFTER rehab including secondary collateral: _____

12. Describe the property (age, condition, size, type, etc.): _____

13. Detailed use of loan proceeds: _____

14. Current lender/loan amount/due date/rate/pay states: _____

15. NOI for most recent two years: _____ / _____ Year to date, annualized: _____
(Attach I & E Statements if available)

16. Discuss terms of leases if not owner occupied: _____

- 17. What percent occupancy do we have currently (attach current rent roll) if not owner occupied? _____

- 18. What is Borrower's Exit Strategy (how does Borrower expect to pay off this loan)? _____

- 19. What is in the immediate neighborhood of the Subject? _____

- 20. What is the closest competition and how is it doing? _____

- 21. Why is this NOT a loan for the Borrower's local bank? _____

- 22. What lenders have seen this loan request? _____

- 23. Are there any wetland/protected species/environmental or archeological issues? If so, provide details: _____

- 24. Transaction summary or areas of special concern: _____

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