

Reference Number: \_\_\_\_\_  
For Official Use Only

*Broker Information*

Broker: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Company: \_\_\_\_\_ Email: \_\_\_\_\_  
Date of Submission: \_\_\_\_\_ Preferred Method of Contact: Phone Email

*Borrower Information*

Borrower: \_\_\_\_\_ Type of Loan: \_\_\_\_\_  
Amount: \_\_\_\_\_ Term of Loan: \_\_\_\_\_  
Property Type: \_\_\_\_\_ Location (City/State): \_\_\_\_\_  
LTV: \_\_\_\_\_ Exit Strategy: \_\_\_\_\_

Brief Overview of Project:

**INITIAL REQUIRED DOCUMENTS**

- |  |   |
|--|---|
| <input type="checkbox"/> Credit Report   | <input type="checkbox"/> Company Financial Statement  |
| <input type="checkbox"/> Company Documents <ul style="list-style-type: none"><li>▪ Articles of Organization/<br/>Incorporation</li><li>▪ Operating Agreement/<br/>Corporate Bylaws</li></ul> | <input type="checkbox"/> Personal Financial Statement |
| <input type="checkbox"/> Two Years Tax Returns of<br>Company & Individual  | <input type="checkbox"/> Purchase & Sale Agreement    |
|  | <input type="checkbox"/> Cost Breakdown               |
|  | <input type="checkbox"/> Plans & Specs                |

*Please fax or email loan applications and required documents*