

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 Request:

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">▪ Articles of Organization/
Incorporation▪ Operating Agreement/
Corporate Bylaws | <input type="checkbox"/> Personal Financial Statement |
| <input type="checkbox"/> Two Years Tax Returns of
Company & Individual | <input type="checkbox"/> Purchase & Sale Agreement |

Please fax or email loan applications and required documents