

LOAN REQUEST SUMMARY

Date: _____

Name of Borrower(s):

Borrower's:

Phone (office): _____ Cell: _____

Fax: _____ Email: _____

Borrower's address:

City: _____ State: _____

Zip: _____

Borrowing Entity:	____ Corporation ____ LLC ____ Partnership
General Partnership:	List all general partners.
Limited Partnership:	List all general partners and any limited partners with an interest of 20% or more (specify managing general partners).
Corporation:	List all shareholders or beneficiaries owning 20% or more of the corporation's stock. Indicate the percentage or number of shares owned.

Indicate the percentage interest or number of shares owned in the "Interest%" Column.

Name	Role (LP/GP/ Pres)	Interest %

Property Address:

Property Description (Check appropriate category):

___ Mixed Use

___ Retail

___ Industrial/Warehouse

___ Office

___ Mini Storage

___ Other

___ Medical Office

___ Hotel/Motel

___ Mobile Home Park

___ Land

Loan Amount: \$ _____ **Acquisition?** _____ **Refinance?** _____

If **acquisition**, what is the purchase price? \$ _____

Borrower down payment: \$ _____

If **refinance**, what was the date of acquisition? _____

What was the original purchase price? \$ _____

How much cash has Borrower put in? \$ _____

Purpose or Refinance?

Is current loan(s) in foreclosure? _____ **Is Borrower in bankruptcy?** _____

Current Debt	Mortgagee	Current Balance	Maturity Date	Rate	Recourse (Yes / No)
1 st Mortgage					
2 nd Mortgage					
Specify					
Specify					

Sources and Uses of Funds:

Sources		
Loan Amount	\$	
Borrower Cash	\$	Source:
Additional Sources	\$	Source:
Total Sources	\$	
Users		
Existing First Mortgage	\$	Lender:
Existing Second Mortgage	\$	Lender:
Capital Improvements	\$	
Closing Costs	\$	
Other	\$	Description:
Total Uses	\$	

What is the exit strategy for this loan?

Has this loan been shopped to other lenders? If so, what is the status: _____

Are there commitments made by other lenders?

Broker/Consultant submitting this summary: _____

Phone: _____ **Email:** _____

Cell Phone: _____