



Please provide initial documentation with loan submission. Initial documentation may consist of some or all of the following: Current tri-merged credit report on all borrowers - 1003 signed and dated - Copy of tax return (self and business) - Rent roll - YTD P&L - Copy of appraisal - Digital Photos - If purchase, copy of purchase contract . Please don't hesitate in sending any other relevant documentation.

Date: \_\_\_\_\_

## Loan Submission Form

**Broker Information**

Broker's Company: \_\_\_\_\_ Broker's Name: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Ext.: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
 E-mail: \_\_\_\_\_ Website: \_\_\_\_\_  
 Broker Fee: \_\_\_\_\_ ( \_\_\_\_\_ points) Additional fees: \_\_\_\_\_ Explain: \_\_\_\_\_

**Borrower's Information**

Borrower Type:      Individual      Corporation      LLC      Partnership      Trust      Other If other, ↓ type

Business name: \_\_\_\_\_

Borrower:      First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_      Credit Scores: \_\_\_\_\_  
 Co-Borrower:      First \_\_\_\_\_ Middle \_\_\_\_\_ Last \_\_\_\_\_      Credit Scores: \_\_\_\_\_

Borrower is in what type of business: \_\_\_\_\_

Borrower's ANNUAL Income: \_\_\_\_\_ If self employed, since when: \_\_\_\_\_

**Property Information**

*If loan is on multiple properties, please send a submission form for each additional property. Only Borrower's Name and Property Information is required for additional property submissions.*

Property Type:      Office      Retail      SFR      Mixed-Use      Multi-Family      Warehouse  
 Mobile Home Park      Vacant land/lot      Other: \_\_\_\_\_

Property Address: \_\_\_\_\_  
City      State      Zip      County

Original Purchase Price: \_\_\_\_\_ Date: \_\_\_\_\_ Zoning: \_\_\_\_\_

Tax Parcel #'s:      Parcel 1 \_\_\_\_\_ Parcel 2 \_\_\_\_\_ Parcel 3 \_\_\_\_\_ Parcel 4 \_\_\_\_\_ Parcel 5 \_\_\_\_\_  
If more than 5 parcels please email list

If appraised, date of appraisal: \_\_\_\_\_ Value: \_\_\_\_\_ Appraiser: \_\_\_\_\_

If not appraised, current estimated value: \_\_\_\_\_ Form of valuation: \_\_\_\_\_

Occupancy Type:      Owner Occupied 100%      More than 50%      Less than 50%      Non-Owner Occupied

Number of rental units: \_\_\_\_\_ Number of units currently rented: \_\_\_\_\_ Total Sq. ft. of buildings: \_\_\_\_\_

What is the verifiable gross MONTHLY rents collected for all occupied units: \_\_\_\_\_

Estimated ANNUAL operating expenses (taxes, Insurance, utilities, repairs, management, etc.): \_\_\_\_\_

**Loan Information**

loan purpose:      Purchase      Rate/Term refinance      Cash Out refinance

Loan Amount: \_\_\_\_\_ If purchase, Purchase Price: \_\_\_\_\_ Closing Date: \_\_\_\_\_

If refinance, 1st mortgage payoff amount: \_\_\_\_\_ 2nd Mortgage payoff: \_\_\_\_\_ 3rd: \_\_\_\_\_  
If more than one property, combine totals on this report and send itemized details in separate email

If cash out refinance, amount of cash out: \_\_\_\_\_ Purpose of cash out: \_\_\_\_\_

Prepayment penalty if any: \_\_\_\_\_ Balloon date if any: \_\_\_\_\_