

## Loan Proposal Summary

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

From: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Borrower: \_\_\_\_\_ Credit Score: \_\_\_\_\_

Loan Amount: \$ \_\_\_\_\_ LTV: \_\_\_\_\_ % CLTV: \_\_\_\_\_ % Closing Date: \_\_\_\_\_

Purchase Price (if purchase): \$ \_\_\_\_\_ Value (if refi): \$ \_\_\_\_\_

Date Acquired (if refi): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Original Cost (Refi): \_\_\_\_\_

Terms Requested: Rate: \_\_\_\_\_ Term: \_\_\_\_\_ Fix: \_\_\_\_\_ Adj: \_\_\_\_\_

Property Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Occupancy: Owner Occupied / Business: \_\_\_\_\_ N/O/O Occupied / Business: \_\_\_\_\_

Property Type: 9+ Units: \_\_\_\_\_ Warehouse/Office: \_\_\_\_\_ Mix Use: \_\_\_\_\_ Industrial: \_\_\_\_\_  
Retail: \_\_\_\_\_ Tell us if not listed: \_\_\_\_\_

Purchase: \_\_\_\_\_ Rehab: \_\_\_\_\_ Rate & Term Refi: \_\_\_\_\_ Cash Out Refi: \_\_\_\_\_

Stated Doc: \_\_\_\_\_ Full Doc: \_\_\_\_\_

What is the purpose or goal for the property:

---

---

What is your required Return On Investment (ROI)?:

---

General Description of Deal/Comments:

---

---

---