

Please Note:

- 1) Fill out Executive Summary using your computer.
- 2) Use your print feature to save as a pdf document on your computer.

Executive Summary Input Form

Submitted By:		Date:
Phone Number:		
Email Address:		
Loan Source?	Where did you find us? Internet, E-mail Advertising, Newspaper, TV, Radio, Referral, Or, . .	
Brief Overview of Loan Request?		
Property Type?		
Date Built?		
How many Units? How many Parcels?		
Borrower's Loan Request ?		
What will this loan accomplish for the borrower?		
Borrower(s) Name, Address, City, State and Email Address Phone Number		
Property(s) Name, Address, City and State?		

<p>Brief Description of the Property Type?</p> <p>Attach Pictures.</p>		
<p>Property Value?</p>		<p>Comments:</p>
<p>Loan Amount?</p>		<p>Comments:</p>
<p>Use of Funds?</p> <p>Include Source and Use of Funds Schedule for Rehab or Construction Loans</p>		
<p>Borrower's Amount & Source of Equity in the Property?</p>		
<p>Loan Type?</p> <p><u>Check All</u> That Apply. →</p>	<p>Purchase</p> <p>Refinance (Rate & Terms) (Cash Out)</p> <p>Bridge Construction Mezzanine Forward Commit Hard Money Development</p>	

<p>Key Principal(s) and Percentage of Ownership?</p>	
<p>Background and Overview of Key Principal(s)?</p>	
<p>Who will personally Guarantee the Loan?</p>	
<p>Liquidity, Net Worth, & 3 Credit Scores of the Guarantor(s)?</p> <p>Attach Personal Financial Statements</p> <p>Are any borrowers in bankruptcy?</p>	
<p>Who will Manage the Property?</p> <p>What is their Management Experience and Track Record?</p> <p>Attach Resume(s)</p>	

<p>NOI of the Property?</p> <p>% of Tennant Occupancy?</p> <p>% of Owner Occupancy?</p>	
<p>Primary Source of Loan Repayment?</p>	
<p>Secondary Source of Loan Repayment?</p>	
<p>Final Comments:</p>	
<p>Attach Tax Returns for Last 3 years</p> <p>Attach this yrs Current Operating Statement</p> <p>Attach Current Rent Roll</p>	