

Account Executive Name: \_\_\_\_\_ Account Manager Name: \_\_\_\_\_

Occupancy:    ☐ Primary - N/A    ☐ Secondary - N/A    ☐ Investor Eligible

Broker Information			
Name	Company	Phone Number	Email

SUBJECT PROPERTY INFORMATION				
Address		City	State	Zip
Building Sq. Ft.	Number of units	Percent occupied %	Does the owner occupy any portion of the building? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how many sq. ft.

LOAN PROGRAM			
Bridge Program Loan Term: <input type="checkbox"/> 12 Months - No DSCR <input type="checkbox"/> 2+1 - DSCR <1.10	Property type	Fees	Citizenship status
<b>Required forms:</b> <input type="checkbox"/> Completed Application <input type="checkbox"/> Credit Authorization (only if lender is pulling credit) <input type="checkbox"/> Credit Report <input type="checkbox"/> Driver's License or Photo ID <input type="checkbox"/> Purchase contract (If the loan is for the purchase of property)	<input type="checkbox"/> Condo <input type="checkbox"/> PUD <input type="checkbox"/> SFR <input type="checkbox"/> Townhome <input type="checkbox"/> Units (1 - 4) <input type="checkbox"/> Units (5+)	<input type="checkbox"/> 3rd pary processing fee: _____ <input type="checkbox"/> Broker credit report fee: _____ <input type="checkbox"/> Broker origination: _____ <input type="checkbox"/> Other fees: _____ _____	<input type="checkbox"/> US Citizen <input type="checkbox"/> Permanent Resident <input type="checkbox"/> Non-Permanent resident <input type="checkbox"/> Foreign National

WHAT PERSON OR ENTITY WILL OWN THE PROPERTY?	
If entity will own the property, list entity name	
LIST OWNER(S) OF ENTITY/COMPANY OR PROPERTY	
Name 1	% of ownership
Personal residence address: _____ Owns residence? <input type="checkbox"/> Yes	Credit score
Name 2	% of ownership
Personal residence address: _____ Owns residence? <input type="checkbox"/> Yes	Credit score
Name 3	% of ownership
Personal residence address: _____ Owns residence? <input type="checkbox"/> Yes	Credit score
Name 4	% of ownership
Personal residence address: _____ Owns residence? <input type="checkbox"/> Yes	Credit score

COMMENTS - OTHER PERTINENT INFORMATION ABOUT THE DEAL

LOAN INFORMATION		
Loan amount requested		Desired rate
Estimated current "As Is" value		
Monthly pmt		
Gross rental income "monthly"		
LTV	DSCR	CAP rate
<b>PURCHASE</b> 1031 exchange? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Current sales price:		
Target closing date:		
<input type="checkbox"/> <b>RATE AND TERM REFINANCE</b> or <input type="checkbox"/> <b>CASH-OUT REFINANCE</b>		
Current loan balance		Current rate
Loan maturity date		
Current lender		
Acquisition price		Mo/Yr acquired
If cash-out, please state what the funds will be used for: _____ _____ _____		Amount \$ _____

ALL QUESTIONS IN THIS SECTION MUST BE ANSWERED TO SUBMIT	
Is subject property currently leased? <input type="checkbox"/> Yes <input type="checkbox"/> No                      If yes, what is the monthly rent received? _____	
Has the applicant and/or co-applicant had any foreclosures in the last 3 years? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Has the applicant and/or co-applicant declared bankruptcy in the last 3 years? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does the applicant and/or co-applicant (s) intend to occupy the property for more than 14 days per year? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does the applicant currently live rent free? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If this is a refinance transaction; Has the subject been listed for sale within the last 6 months? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, the subject must be de-listed prior to application date.    Date de-listed _____	



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

Loan Number: \_\_\_\_\_

Program Name: \_\_\_\_\_

Hello UW,

**INCOME:**

☐ Full Doc   ☐ WVOE   ☐ Banks Statement: 12 or 24 Months   ☐ 1099

☐ Rental Cash Flow   ☐ Asset Qualifier   ☐ P&L

**CREDIT:**

**EXCEPTION:**

**Additional Comments:**

