

Account Executive Name: _____

Account Manager Name: _____

Program: **G-PA** **G-PA 525 (1-year term)** **G-PA 525 (2-year term)** **BOB Light Rehab** (≤ \$150k or ≤ 50%) **BOB Heavy Rehab** (> \$150k or >50%)

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 DETAILS			
Property type	Fees	Citizenship status	Term
<input type="checkbox"/> Condo <input type="checkbox"/> Townhome <input type="checkbox"/> PUD <input type="checkbox"/> Units (1 - 4) <input type="checkbox"/> Mixed Use <input type="checkbox"/> Units (5+) <input type="checkbox"/> SFR	<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	<input type="checkbox"/> 12 month <input type="checkbox"/> 24 month

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
PURCHASE 1031 exchange? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Current sales price:		
Target closing date:		
<input type="checkbox"/> PURCHASE <input type="checkbox"/> REFINANCE <input type="checkbox"/> CASH-OUT REFINANCE		
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 currently live rent free?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, the subject must be de-listed prior to application date. Date de-listed _____	

Bridge Submission Requirements			
<input type="checkbox"/> Bridge Submission Form <input type="checkbox"/> Commercial Loan Application <input type="checkbox"/> Driver's License or Photo ID <input type="checkbox"/> Schedule of Real Estate (matching all mortgage loans identified in the credit report to REO) <input type="checkbox"/> Credit Authorization (only if lender is pulling credit) <input type="checkbox"/> Credit Report within 60 days of submission <input type="checkbox"/> Assets covering most recent 30 days (if program requires) <input type="checkbox"/> Purchase Contract (if applicable) <input type="checkbox"/> LLC documents (if vesting in LLC)	<th colspan="2">Additional B.O.B Requirements</th>	Additional B.O.B Requirements	
	<input type="checkbox"/> Borrower track records/experience with rehab loans <input type="checkbox"/> Borrower project business plan detailing the size, scope and exit strategy of the project <input type="checkbox"/> Completed Loan Sizer, all applicable fields and tabs <input type="checkbox"/> Project bids and estimates <input type="checkbox"/> General contractor details <input type="checkbox"/> General contractor insurance		

Mortgagee clause - Hometown Equity Mortgage, LLC its successors and/or assigns 25531 Commercentre Dr #250 Lake Forest, CA 92630



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:

