Financing Intake Form

LOAN INFORMATION

|  |  |
| --- | --- |
| Debt Type and Amount: $ |  |
| Sponsor’s Equity Amount: $ |  |
| Purchase Price (if applicable): |  |
| Property Value: $ |  |
| Appraised Value and Year: |  |
| Use of Proceeds/Purpose: |  |
| Duration (term): |  |
| Closing deadline: |  |
| Reason for deadline: |  |
| Current Debt (if applicable): |  |
| Open to recourse (Yes or No): |  |

PROPERTY INFORMATION

|  |  |
| --- | --- |
| Street Address: |  |
| Property type (Ground up construction, conversion, existing asset) |  |
| Property Description (i.e. multifamily, hospitality, or office): |  |
| Number of Units (or Sq ft): |  |
| Purchase Date or target purchase date: |  |
| Construction budget: |  |

GUARANTOR(S) INFORMATION

|  |  |
| --- | --- |
| Sponsor(s) name: |  |
| Sponsor(s) Location: (city) |  |
| Sponsor(s) previous projects: |  |
| Net Worth of Guarantor(s): |  |

EXIT STRATEGY:

|  |  |
| --- | --- |
| OBSTACLES/Challenges |  |