

CLIENT INTAKE FORM

Personal Information

Name: _____
Phone Number: _____
Email Address: _____
Date of Birth: _____
Primary Address: _____

Business Information

Company Name: _____
Position/Title: _____
Business Website (if applicable): _____

Loan Information

Property Address: _____
Loan Type: _____

- Fix and Flip
- Fix and Hold
- DSCR
- Commercial
- New Construction
- Cash-Out Refinance
- Rate & Term Refinance

Loan Amount Requested: _____

Client Background

Experience with Real Estate Investing: _____

- First Deal
- 2-5 Properties
- 6+ Properties

Current Credit Score (approximate): _____

Are You Currently Under Contract?

- Yes
- No

Property Information

Estimated Property Value: _____

Purchase Price (if applicable): _____

Rehab/Construction Budget: _____

ARV (After Repair Value): _____

Property Type:

- Single Family
- Multi-Family
- Mixed-Use
- Commercial
- Other (specify): _____

Additional Details

How Did You Hear About Us? _____

Do You Currently Work With a Hard Money Lender?

Yes (specify): _____

No

What Is Your Desired Closing Timeline? _____

Supporting Documentation

(Please check all that apply and attach documents if available)

- Purchase Agreement
- Scope of Work (if applicable)
- Current Property Photos
- Financial Statements
- LLC Operating Agreement (if purchasing through an LLC)

Signature

I certify that the above information is true and correct to the best of my knowledge.

Client Signature: _____

Date: _____