



Re-Finance Intake Form

(Any questions that don't apply please use N/A)

1. Asset Type:

2. Procuring Broker:

3. Company's Legal Name:

4. Address:

5. State of Incorporation:

6. Primary Principal:

_____ % of Ownership: _____ Phone: _____ Email: _____

7. Secondary Principal:

_____ % of Ownership: _____ Phone: _____ Email: _____

8. Tertiary Principal:

_____ % of Ownership: _____ Phone: _____ Email: _____

9. Loan Amount Request: \$ _____

10. New or Cash-out Refi: _____

11. Type of project: _____

12. Project Location: _____

13. Property Management Company: _____

14. Property Website: _____

15. Exit or Repayment Strategy: _____

16. Stage of Approvals: _____

17. Amount of Purchase: _____

18. Use of Funds:

19. Soft Cost:

20. Working Capital:

21. Contingency Amount:

22. Interest Reserve:

23. Financing Cost:

24. Current Property Value:

25. Existing Debt Amount:

26. Mechanics Lien:

27. Other Liens:

28. Seller Financing Amount:

29. Projected CAP Rate / IRR:

30. Deferred Maintenance Amount:

31. Net Operating Income:

32. Percentage of Vacancy:

33. Latest Appraisal:

34. Date of Appraisal:

35. Land Size:

36. Current Building Size:

ATTACHMENT SECTION BELOW



Please Attach the Following Forms, if Applicable:

- Proforma
- Survey of the Property
- Appraisal if provided
- Title Report
- Summary of Completed Projects

- Architectural Drawings
- Rent Roll
- Project Executive Summary
- P & S Agreement
- Permits
- Market Comps

Comments: _____

I, the undersigned, as the primary principal(s), hereby declare that all information provided herein or in connection herewith is true, correct, and complete to the extent possible, and all estimates are reasonable.

Authorized Signatory

Print Name

Date: _____