



## New Development Intake Form

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

1. **Development Type:** \_\_\_\_\_

2. **Procuring Broker:** \_\_\_\_\_

3. **Company's Legal Name:** \_\_\_\_\_

4. **Address:** \_\_\_\_\_

**City:** \_\_\_\_\_

**State, Zip, Country:** \_\_\_\_\_

5. **State of Incorporation:** \_\_\_\_\_

6. **Primary Principal:** \_\_\_\_\_

**% of Ownership:** \_\_\_\_\_

**Telephone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

7. **Secondary Principal:** \_\_\_\_\_

**% of Ownership:** \_\_\_\_\_

**Telephone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

8. **Tertiary Principal:** \_\_\_\_\_

**% of Ownership:** \_\_\_\_\_

**Telephone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

9. **Type of Project:** \_\_\_\_\_

10. Name of Project: \_\_\_\_\_

11. Street Address: \_\_\_\_\_

12. City, State, Country: \_\_\_\_\_

13. Consumer Base: \_\_\_\_\_

14. Supporting Industries: \_\_\_\_\_

15. Total Project Cost: \_\_\_\_\_

16. Equity Required: \_\_\_\_\_

17. Loan Amount Request: \_\_\_\_\_

18. Cap Rate/IRR: \_\_\_\_\_

19. Sponsor / Borrower Equity Contribution: \_\_\_\_\_

20. Is Purchase Contract in Place: \_\_\_\_\_

21. Purchase Price: \_\_\_\_\_

22. Earnest Money Paid: \_\_\_\_\_

23. Contract Expiration Date: \_\_\_\_\_

24. Land, Numbers of Acres (SF): \_\_\_\_\_

25. Is Project Fully Entitled: \_\_\_\_\_

26. Has the project received municipal approvals and permits? \_\_\_\_\_

27. Environmental Phase 1 Completed: \_\_\_\_\_

28. **Environmental Phase 2 Completed:** \_\_\_\_\_
29. **State or Local Tax Incentives:** \_\_\_\_\_
30. **Current "As Is" Property Value:** \_\_\_\_\_
31. **Percentage of Vacancy:** \_\_\_\_\_
32. **General Contractor-Constr. Manager:** \_\_\_\_\_
33. **Number of Construction Phases:** \_\_\_\_\_
34. **Site Development Cost:** \_\_\_\_\_
35. **Total Improvement Cost:** \_\_\_\_\_
36. **Time to Stabilization:** \_\_\_\_\_
37. **Expected Absorption Rate:** \_\_\_\_\_
38. **Total Completed Value:** \_\_\_\_\_
39. **Total Sq. Ft. of Buildings:** \_\_\_\_\_
40. **Number of Buildings:** \_\_\_\_\_
41. **Amount Invested by Borrower to Date:** \_\_\_\_\_
42. **Use of Funds:** \_\_\_\_\_
43. **Soft Costs:** \_\_\_\_\_
44. **Working Capital:** \_\_\_\_\_
45. **Contingency Amount:** \_\_\_\_\_

46. Interest Reserve: \_\_\_\_\_

47. Financing Costs: \_\_\_\_\_

48. Leasing Plan: \_\_\_\_\_

49. Property Management Company: \_\_\_\_\_

**Please Attach the Following Forms, if Applicable:**

- Proforma
- Survey of the Property
- Appraisal if provided
- Summary of Completed Projects
- Architectural Drawings
- Rent Roll
- Project Executive Summary
- P & S Agreement/ Lease
- Feasibility Studies
- Permits
- Market Comps

Comments: \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_  
**Authorized Signatory**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Date**