

Questionnaire for Executive Summary

Please answer the following questions to help us prepare an accurate and concise Executive Summary for your financing needs. This information is essential for assessing your project and expediting the approval process.

Don't worry, if you don't have/know the answers to any of these, please just note n/a or that we need to chat for further information!

1. What type of property is involved (e.g., multi-family, commercial, land, etc.)?
2. Is this a purchase or a refinance?
3. Will the property be owner-occupied or used as an investment?
4. Who is or will be the borrower(s)?
5. Is there an operating business involved with the property?
6. What is the estimated property value and how much mortgage financing is required?
7. What is the ownership structure (e.g., corporation, holding company, trust)?
8. Do you have other properties or existing mortgages that could be used as inter-alia security?
9. What is your timeline for the initial financing and/or what is your exit strategy?
10. What third-party reports are already available (e.g., appraisal, ESA, geotech)? If none, are you open to discussing costs for obtaining them?
11. Do you have a Personal Net Worth Statement available for all borrowers/guarantors?
12. What are your expectations regarding interest rates and lender fees, if any?
13. Do you have a resume or summary of relevant real estate or business experience?
14. Who is the best point of contact for this deal (including any accountants or lawyers involved)?
15. How did you hear about us? (Referral source)