

Information About the Loan
Purchase or Refinance

- Property access instructions

- Required entity information

- All entities and individuals who are part of the borrowing organization

- Guarantor(s)'s SSN and DOB

- Rehab information/Scope of Work

- Rehab budget information

- Hazard insurance agent information

- Closing agent information

- Title company with email and phone

Documents for Upload

- A copy of the executed purchase contract and addenda (when applicable)
- A copy of a voided check for monthly ACH auto-debit
- Borrower's real estate transaction history and schedule of real estate owned for the past 3 years
- Articles of incorporation
- Borrower's current organizational operating agreement
- EIN number
- Signed disclosures by borrower (will be sent via DocuSign)
- Signed Borrowing authorization form (will be sent via DocuSign)
- Driver's License
- Payment for appraisal needed

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