

I included deal information templates below for Fix and Flip and Long Term Rentals. Once I receive the completed template, I'll return a soft quote quickly.

30 YEARS

Property type: (Duplex, triplex, etc.)
Transaction type (purchase, cash out, refinance):
Property address:
Number of units:
Purchase price or as is value:
Annual taxes:
Annual insurance:
HOA dues (if applicable):
Rented or vacant?
Current rent or expected rent:
Mortgage balance:
Estimated credit score:

Fix & flip or bridge loans:

Property type: (Duplex, triplex, etc.)
Loan type: (Fix and flip, cash out, etc.)
Mortgage balance:
Property address:
Number of units:
Purchase price or as is value:
Rehab budget:
Projected ARV:
How many renovation projects completed in the last 3 years:
How many rentals owned in the last 3 years:
Estimated credit score:

If the borrower would like to proceed after receiving the soft quote, below are lists of documents we collect to advance to processing. I'd like to review the scenario first with the template you send:

Document Needs List: 30yr

0. **Complete application** (attached) including credit and background check authorization for each guarantor
1. **Title Agent/Attorney Contact** (need name, email, phone #)
2. **Point of contact for appraisal** (Who to reach for scheduling? – need name, email, phone)
3. **Purchase Contract** (if applicable) – **needs to be in the name of the borrowing entity**
4. **Lease Agreement** (if applicable)
5. **Condo Questionnaire** (if applicable) – *need to confirm that it is warrantable*
6. **Operating Agreement, EIN Letter, and Articles of Organization** for borrowing entity

Document Needs List: Bridge / Fix and Flip

- **Complete application** (attached) including credit and background check authorization for each guarantor
- **Borrower Experience** (attached) – this is where borrower will list all properties they have taken title/had title on within the last three (3) years – flips and rentals included

- **Title Agent/Attorney Contact** (need name, email, phone #)
- **Point of contact for appraisal** (Who to reach for scheduling? – need name, email, phone)
- **Purchase Contract** (if applicable) – **needs to be in the name of the borrowing entity**
- **Lease Agreement** (if applicable)
- **Condo Questionnaire** (if applicable) – *need to confirm that it is warrantable*
- **Completed rehab budget** (if applicable, attached) – this should be as thorough as possible and best to confirm with a contractor. The more description of the work to be done, the better it will support the ARV on an appraisal. For example, if doing tile floors in the kitchen – list that exactly instead of just saying “kitchen flooring”, where an appraiser might assume laminate. *Please return this document in the format that is attached as an excel spreadsheet or PDF.*
- **Operating Agreement, EIN Letter, and Articles of Organization** for borrowing entity

Best regards,