

C-referrals.com

Needs Analysis Interview Form

Lender :

Atten :

From: _____

Date: _____ Phone: _____ Email/Fax: _____

Borrower(s): _____ :

Borrower(s) FICO Score(s): _____ Equity/Cash in Project: _____

Personal Net Worth: _____ Liquidity: _____ Experience: _____

Property Address: _____

Property Type: _____ Owner Occupied: ☐ Y/ ☐ N

Building Size: _____ Number of Units: _____ Occupancy: _____

Loan Request: _____ Estimated Value: _____ LTV: _____

Date Purchased: _____ Purchase Price: _____

Property Income: _____ Expenses: _____ NOI: _____

Purpose of Loan: (Select all that apply) ☐ Purchase ☐ Re-finance ☐ Construction

Desired Loan: ☐ Hard/Fast or ☐ Best Rate

Income and Assets: ☐ Full Doc or ☐ Stated Other

Refinance
Purchase
Expenses

Pay off mortgage: _____ Purchase Price: _____ Taxes: _____

Taxes: _____ Down Payment: _____ Insurance: _____

Cash Out: _____ Secondary Financing: _____ Water & Sewer _____

Other: _____ Amount Financed: _____ Electricity: _____

Closing Costs: _____ Closing Costs: _____ Repair & Maint: _____

Loan Request: _____ Loan Request: _____ Trash: _____

Exit/Payoff Strategy: _____ Misc: _____

Summary of Facts:
