

# EasyFlip™ Intake Form

(Fix & Flip – 1–4 Units)

## 1. LOAN SUBMISSION DETAILS

Date Submitted: \_\_\_\_\_  
Email: \_\_\_\_\_

LO/Broker Name: \_\_\_\_\_  
Phone: \_\_\_\_\_

## 2. PROPERTY & PROJECT INFORMATION

Subject Property Address

City

State

Zip

Property Type

Current Condition

Year Built

Acquisition Source

Transaction Type

Project Summary

Units

Sq. Ft.

Zoning

Construction Type

Entity Name

### If MID-SWING – Answer the following:

Rehab % Complete \_\_\_\_\_  
Rehab \$ Spent \_\_\_\_\_  
Weather-Tight \_\_\_\_\_  
Demo Complete \_\_\_\_\_  
Completion Date \_\_\_\_\_

Total Rehab Budget \_\_\_\_\_  
Rehab \$ Remaining \_\_\_\_\_  
Major Systems Done \_\_\_\_\_  
GC Active \_\_\_\_\_  
Occupancy Status \_\_\_\_\_

NOTES \_\_\_\_\_

## 3. LOAN REQUEST DETAILS

### If PURCHASE – Answer the following:

Purchase Price \_\_\_\_\_  
Rehab Budget \_\_\_\_\_  
EMD \_\_\_\_\_  
Sales Contract Signed \_\_\_\_\_  
Target Close Date \_\_\_\_\_

After Repair Value \_\_\_\_\_  
Seller Credits \_\_\_\_\_  
Down Payment \_\_\_\_\_  
Contingency Ends \_\_\_\_\_  
Exit Strategy \_\_\_\_\_

NOTES \_\_\_\_\_

### If REFINANCE – Answer the following:

Orig. Purchase Price \_\_\_\_\_  
Existing Liens/Loans \_\_\_\_\_  
Previous Rehab \_\_\_\_\_  
Rehab \$ Spent \_\_\_\_\_  
Completion Date \_\_\_\_\_  
New Rehab Budget \_\_\_\_\_  
Loan Request \_\_\_\_\_  
Target Rent (if Fix & Hold) \_\_\_\_\_

Orig. Purchase Date \_\_\_\_\_  
Current Payoff(s) \_\_\_\_\_  
Prior Budget \_\_\_\_\_  
As-Is Value \_\_\_\_\_  
Last Appraisal Date \_\_\_\_\_  
After Repair Value \_\_\_\_\_  
Weather-Tight \_\_\_\_\_  
Current Monthly Rent \_\_\_\_\_

NOTES \_\_\_\_\_

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## 4. PROJECT & FUNDING DETAILS

Draw Schedule		# Draws Requested	
Permit Status		Insurance in Place	
Initial Adv. Requested		Budget Holdback	
GC Agreement		Exit Strategy	
Contingency Funds		Project Managed By	
Target List Price (if Sell)		Target Rent (if Hold)	
NOTES: _____			

## 5. EXPERIENCE (LAST 36 MONTHS) & TRACK RECORD (LIFETIME)

# Completed Flips		Largest Project ARV	
Largest Proj. Budget		Max Proj. Purchase \$	
Experience Tier		Avg. Proj. Time (mo.)	
NOTES: _____			

## 6. GUARANTOR/BORROWER INFORMATION

### Guarantor's Information

### Co-Guarantor's Information (if applicable)

Name:		Name:	
Email:		Email:	
Phone:		Phone:	
Credit Score:		Credit Score:	
Experience:		Experience:	
Liquidity(\$):		Liquidity(\$):	
NOTES _____			

## 7. SUPPORTING DOCUMENTS – SUBMIT VIA DOCDROP™ OR EMAIL

### DOCUMENT TYPE

### DESCRIPTION

<b>ID Verification:</b>	Government-issued photo ID (Driver's License or Passport) for all guarantors.
<b>Entity Formation Docs:</b>	Articles of Organization/Incorporation, EIN Letter, and Operating Agreement/Bylaws.
<b>Real Estate Schedule (SREO):</b>	Current list of all investment properties owned, including addresses, values, debt, and rental income.
<b>Experience Track Record:</b>	Spreadsheet of completed real estate projects (include dates, ARVs, budgets).
<b>Purchase Contract (if purchase):</b>	Fully executed purchase agreement signed by all parties.
<b>Permits (if applicable):</b>	Copies of all required building, renovation, or trade permits issued for the project.
<b>Rehab Budget &amp; Scope of Work:</b>	Detailed, line-item budget with cost breakdown and descriptions of planned work.
<b>Contractor License &amp; Insurance:</b>	Current contractor license(s) and proof of active liability and/or workers' comp coverage.
<b>Current Condition Photos:</b>	Clear photos of all sides of the exterior and all interior rooms/areas of the property.
<b>3 Months Bank Statements:</b>	Personal or business statements to verify liquidity and reserves.
<b>Prop. Insurance Quote/Policy</b>	Must cover subject property and requested loan amount; show named insured matches entity/borrower.

**Click here for required documents – DealKit™**