

Transaction Name			
Transaction Submission Date			Branch Name or #
Referring Broker Name:			
Phone:			
Email:			

S1: TRANSACTION NARRATIVE

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S2: THE TRANSACTION

S2a: PURCHASE

Ratified Contract		Purchase Price		Closing Date	
		Down Payment		Financing Needed	0

S2b: REFINANCE

Date of Purchase		Purchase Price		Capital Invested ¹	
Market Value		Current Lien(s)		Cash Out	
				Financing Needed	0

S2c: PURCHASE & REHAB

Purchase Price		Development Cost		Construction Cost	
Project Cost		0 Down Payment		Financing Needed	0
Exit Strategy				Pre-Financing LTV	
				Post-Financing LTV	

S3: THE PROPERTY

Complete Address					
Type		Condition		Purchase Date	
Appraisal Date		Appraisal Value		Market Value ²	
Owner-Occupied		Single Tenant		Multi-Tenant (#)	
Rental Income		Operating Expenses		Vacancy Percentage	
Building Size		Lot Size		Number of Units	
Support for Market Value & Comments					

S4: THE BORROWER

Name				Email	
Address					
Cell Phone		Office Phone		Annual Income	
Borrower's Credit		Bankruptcies		Judgements	
Other Properties	1		Value		Mortgage
	2		Value		Mortgage
	3		Value		Mortgage
	4		Value		Mortgage
How does Borrower plan to service debt					
Immigration Status:	U.S. Citizen	<input type="checkbox"/>	Resident Alien	<input type="checkbox"/>	Foreign Nat'l
Employer		Industry		Business Owned (yrs)	
Annual Revenues		Years in Industry		No. of Employees	

S5: PROPERTY'S NET OPERATING INCOME ("NOI")

Gross Rental Income		Insurance		Other	
Association Dues		Real Estate Taxes		Other	
Utilities		Maintenance			
Landscaping		Other		Annual NOI:	0