

# COMMERCIAL BUSINESS LOAN EXECUTIVE SUMMARY / INTAKE FORM

By filling out this form, authorization is hereby given to the Facilitator/Lender to verify in any manner it deems appropriate all info you provide in this form.

CLIENT CONTACT INFORMATION	
<b>Borrowers Name:</b>	
<b>Borrowers Credit Score (FICO):</b>	
<b>Company Name:</b> (LLC, C, or S Corp):	
<b>Business Address:</b>	
<b>City / State / Zip:</b>	
<b>Cell Phone:</b>	
<b>Email Address:</b>	
<b>Website:</b>	
DEAL SUMMARY	
<b>Amount of financing requested:</b>	
<b>Purpose of loan (purchase or refi):</b>	
<b><i>If <u>Purchase</u>:</i></b>	
<b>Purchase price:</b>	
<b>Amount of down payment:</b>	
<b>Sales contract in place?</b>	
<b>Sales contract closing date?</b>	

<b>If a Flip, how many flips has borrower completed in the last 36 months?</b>	
<b>After repair value (ARV):</b>	
<b>Schedule of use of proceeds:</b> (if fix & flip, attach excel spread sheet with scope of work budget)	
<b><i>Refi:</i></b>	
<b>Purchase price?</b>	
<b>Year of purchase?</b>	
<b>As-Is value of collateral?</b>	
<b>1<sup>st</sup> lien balance:</b>	
<b>2<sup>nd</sup> lien balance:</b>	
<b>Other liens?</b>	
<b>What has been done to increase the value of the property?</b>	
<b>PROPERTY DESCRIPTION</b>	
<b>Description of real estate:</b>	
<b>Address:</b>	
<b>Borrower's current equity in Property?</b>	
<b>Any special issues, problems, needs or timing requirements?</b>	
<b>Property Cash flowing?</b> (if so, provide cash flow spread sheet)	


**ADDITIONAL COLLATERAL (IF APPLICABLE)**

<b>Property type &amp; description:</b>	
<b>Address:</b>	
<b>City / State / Zip:</b>	
<b>Value of property:</b>	
<b>1<sup>st</sup> lien balance:</b>	
<b>2<sup>nd</sup> lien balance:</b>	
<b>additional comments</b>	

**INFORMATION ABOUT PROPOSED BORROWER**

<b>Borrower's occupation:</b>	
<b>Prior project experience:</b>	
<b>Net worth or financial strength of primary Principals, (excluding this project, in US Dollars):</b>	
<b>Primary Principal's last 3 years' average income:</b>	
<b>Exit strategy:</b> (Please give as much detail as possible)	
<b>What has been done thus far to secure financing?</b>	

<b>Please state why you are seeking hard money / private money instead of conventional financing:</b>	

THIS IS A PRELIMINARY SUMMARY FOR A COMMERCIAL LOAN. THERE IS NO ASSURANCE THAT WE WILL ACCEPT THE TRANSACTION FOR FURTHER PROCESSING.

**\*NOTICE:** The undersigned understands and acknowledges that this document is being utilized in connection with an application for a commercial loan.

**\*NOTICE:** This is *not a commitment* to lend or a guarantee for financing or loan approval on any loan.

No credit check up front.

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

**Additional Notes or Explanations:**