

**Please Note:**

- 1) Fill out Executive Summary using your computer. Please leave first section blank.
- 2) Use your print feature to save as a pdf document on your computer.

## Executive Summary Input Form

<b>Submitted By:</b>		<b>Date:</b>
<b>Phone Number:</b>		
<b>Email Address:</b>		
<b>Loan Type:</b>		
<hr/>		
<b>Brief Overview of Loan Request?</b>		
<b>Property Type?</b>		
<b>Date Built?</b>		
<b>How many Units? How many Parcels?</b>		
<b>Borrower's Loan Request ?</b>		
<b>What will this loan accomplish for the borrower?</b>		
<b>Borrower(s) Name, Address, City, State and Email Address Phone Number</b>		
<b>Property(s) Name, Address, City and State?</b>		

<p><b>Brief Description of the Property Type?</b></p> <p><b>Attach Pictures.</b></p>		
<p><b>Property Value?</b></p>		<p><b>Comments:</b></p>
<p><b>Loan Amount?</b></p>		<p><b>Comments:</b></p>
<p><b>Use of Funds?</b></p> <p><b>Include Source and Use of Funds Schedule for Rehab or Construction Loans</b></p>		
<p><b>Borrower's Amount &amp; Source of Equity in the Property?</b></p>		
<p><b>Loan Type?</b></p> <p><b><u>Check All That Apply.</u> →</b></p>	<p>Purchase</p> <p>Refinance (Rate &amp; Terms) (Cash Out)</p> <p>Bridge Construction Mezzanine Forward Commit Hard Money Development</p>	

<p><b>Key Principal(s) and Percentage of Ownership?</b></p>	
<p><b>Background and Overview of Key Principal(s)?</b></p>	
<p><b>Who will personally Guarantee the Loan?</b></p>	
<p><b>Liquidity, Net Worth, &amp; 3 Credit Scores of the Guarantor(s)?</b></p> <p><b>Attach Personal Financial Statements</b></p> <p><b>Are any borrowers in bankruptcy?</b></p>	
<p><b>Who will Manage the Property?</b></p> <p><b>What is their Management Experience and Track Record?</b></p> <p><b>Attach Resume(s)</b></p>	

<p><b>NOI of the Property?</b></p> <p><b>% of Tennant Occupancy?</b></p> <p><b>% of Owner Occupancy?</b></p>	
<p><b>Primary Source of Loan Repayment?</b></p>	
<p><b>Secondary Source of Loan Repayment?</b></p>	
<p><b>Final Comments:</b></p>	
<p><b>Attach Tax Returns for Last 3 years</b></p> <p><b>Attach this yrs Current Operating Statement</b></p> <p><b>Attach Current Rent Roll</b></p>	