



Real Estate Investment
Loan Application Questionnaires

Application Submission Date _____

Borrower Name: _____

Co-Borrower Name: _____

Borrower Phone #1: _____ Borrower Phone #2: _____ Time Zone: _____

Borrower Email: _____ Co-Borrowers Email: _____

Transaction Type: __Purchase__ Refi. __Cash-out__ __New Development

Property Type: __SFR__ __2-4__ __5+__ __Comm. - Explain Description: _____

Sale Type: __Normal Listing__ __Private (off-market)__ __Already Owner

Desired COE: _____ Down Payment Available (if Purchase): _____

Loan Amount Requested: \$ _____ (Total) _____ Purchase _____ Reno. /Dev.

Renovations Needed: Y / N - If yes: _____

How long to complete rehab.: _____ Did you make an offer yet? Y / N - Offer Accepted: Y / N

****FULL Property Address:**

(Street) _____ (City) _____ (State) _____ (Zip) _____

Can we gain access inside: Y / N

As-Is Property Value: _____ How Determined: (Appraisal / BPO / Guess) If Appraisal, When: _____

After Repaired Value (ARV): _____ Purchase Price: _____

Credit Score: _____ Liquid Assets (on-hand): _____ Experience # of deals in last (3) years: _____

Preferred Realistic Rate: _____ Term: _____ (Short/Long Term) Exit Strategy: __Sell__ __Hold__ __Refi.-out

If a Refinance:

How much is payoff: _____ (1st Lien) _____ (2nd Lien)

How much is (annual) property taxes/insurance: _____ (Taxes) _____ (Insurance)

When was property originally purchased? ____/____/____ How much paid: \$ _____

How much money has been put into the property already (reno., add-on, etc.)? _____

Is property rented? Y / N – If yes, how much is Gross Rent: _____, How much is net: _____

NOTES: Key Points:

Is there an HOA: Y / N –If so, how much: _____