



Investment Real Estate Deal Summary

To be completed by investor or broker regarding new loan request and subject property to be financed.

Date:

Borrower (principal)

Borrower's name (principal)	
Borrower's telephone number	
Borrower's email	
Borrower's most recent credit score(s)	
Is/will the subject property be titled in borrower's personal name or an entity?	
Entity name (if applicable)	
Borrower's percentage of ownership in entity	
Are there any partners?	
How many?	
Does borrower own his/her primary residence?	
How long owned current primary residence?	
Does borrower own other investment properties?	
# of investment properties currently owned	

Subject Property

Is this property raw land, rural, special purpose, or a construction project?	
Subject property address (street/city/state)	
Exact property type (SFR, mixed use, apartment building, office, retail, etc)	
How many tax parcels are there for the subject property?	
Total number of buildings	
Total number of units	
Estimated site size (in acres)	
What is the subject property currently being used for?	
What does the borrower intend to use it for?	
Does borrower plan to occupy subject property?	
Are there currently tenants in the subject property?	
Percentage of occupancy of subject property	
Current total gross monthly rental income on subject property	
Are there leases in place with existing tenants?	
Purchase or refinance transaction?	
If purchase, purchase price	
If purchase, is there a signed purchase contract between buyer/seller?	

If purchase, how much does borrower have for down payment/closing costs?	
Estimated current market value of subject property	
Basis for this value? (Zillow, LoopNet, recent appraisal, etc)	
If refinance, total amount of existing liens	
If refinance, how long has borrower been on title?	
If refinance, who is on title?	
Is the strategy to flip & sell or buy & hold the subject property?	
Does the property need any repairs?	
Cost in total repairs anticipated	
What repairs will be done?	
Is the property market ready for leasing?	

Finance Needs

Loan amount desired	
Minimum acceptable loan amount	
How soon would borrower like to close on this loan?	
What is more important - speed of closing, rate/term, documentation required?	
Is a short term or longer-term loan preferred?	
Has borrower been turned down for financing elsewhere?	
Why?	

Comments/Important to Know

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Upon completion, please email this summary to us for review.

We look forward to working with you and value your business!

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