

Loan Registration Form

Form is fillable in Adobe Acrobat

Please complete this form and email with the following attachments to your Account Executive or to info@equityfinanceloans.com (one will be assigned):

Loan Registration Form

Current Rent Roll (Yours or use the attached form)

Last two years and YTD property operating statements (Yours or use the attached form)

Owner Occupied Properties - Last two years tax returns and YTD P&L for operating business

Purchase Contract (if applicable)

Note: If these items are not included we will not be able to review your loan request or issue a Letter of Interest

Broker Information

Company _____ Loan Officer Email _____
 Loan Officer _____ Loan Officer Phone _____

Borrower Information

Name of Borrower or Guarantor	Ownership %	Residence City	Liquidity	Net Worth	Credit
#1 _____	B G _____	_____			
#2 _____	B G _____	_____			
#3 _____	B G _____	_____			
#4 _____	B G _____	_____			

Yes **Have any Borrowers or Guarantors:** Yes

Had a property foreclosed in last 3 years?	Are any borrowers or guarantors foreign nationals?
Filed for bankruptcy in the last 5 years?	Any borrower or guarantor missed mortgage payments in last 12 months?
<u>Failed</u> to file Federal tax returns in the last 3 years?	Are there back real estate taxes owed on the subject property?

If "YES" to any question above please explain. Any unique aspects / focus of the deal?

Property Information

Address _____ Property Type: _____
 City _____ State _____ ZIP _____ Multifamily Retail Mixed Use
 Building SF _____ # of Units _____ Occupancy % _____ Industrial Office Self Storage
 Occupancy Investor Owner _____ % Mobile Homes Other _____

Does the property have?: Underground or above ground storage tanks Automotive repair uses Ongoing environmental remediation
 Hazardous material handling / Licensing On-site dry cleaner plant A prior Phase 1 report available

Loan Information

Loan Amount Requested _____	Annual Gross Income _____
YSP % _____ Desired Rate _____ AM _____ (mos.)	Annual Operating Expense _____
Current Estimated Value _____	Annual Net Operating Income _____
Monthly Pmt _____ Annual Pmt _____	LTV _____ DCR _____ CAP Rate _____

*Type in Loan Amount, Desired Rate, Gross Income and Expense to generate payment and DCR

Purchase	Rate & Term Refi	Cash Out Refi
Current Sales Price _____	Current Loan Balance _____	Current Loan Balance _____
Target Closing Date _____	Loan Maturity Date _____ Pre-pay? Yes	Loan Maturity Date _____ Pre-pay? Yes
Second or Seller Financing Yes \$ _____	Current Lender _____	Current Lender _____
1031 Exchange? Yes	Current Interest Rate _____ Year Purchased _____	Current Interest Rate _____ Year Purchased _____
	Original Purchase Price _____	Original Purchase Price _____

Comments - What is the pertinent story behind this transaction?

Rent Roll - Commercial
(Office, Industrial, Retail, Mixed Use)

Rent Roll as of: (required)

PLEASE COMPLETE ALL COLUMNS AND SECTIONS

PROPERTY ADDRESS							CITY			STATE	ZIP CODE
STE. #	TENANTS NAME (Put vacant for vacant space)	SQ. FEET (approx)	CURRENT MONTH RENT IN PLACE	ORIGINAL OCCUPANCY DATE	LEASE START DATE OR MTM	LEASE EXPIRATION DATE	LEASE TYPE (NNN, MOD. GROSS, GROSS)	MONTHLY CAM CHARGES	NEXT RENT INCREASE (MO / YR)	NEXT RENT INCREASE AMT (\$ / MO)	EXTENSION OPTIONS? (Y / N)
Totals											

NOTES ON TENANTS

I (we) certify under penalty of perjury that the foregoing information herein is true and accurate.

BORROWER	Date

BORROWER	Date

Rent Roll - Multifamily

(For Mixed Use Please use Commercial Rent Roll)

Rent Roll as of : (required)

PROPERTY ADDRESS				CITY				STATE		ZIP CODE	
TOTAL NUMBER OF UNITS		# OF VACANT UNITS		# OF FURNISHED UNITS		# OF UNFURNISHED UNITS		# SECTION 8 UNITS			
APT. #	TENANTS NAME	BDR / BATH	SQ. FEET (approx)	CURRENT RENT PER MO.	ORIGINAL OCCUPANCY DATE	CURRENT LEASE EXPIRATION or MTM	DATE LAST RENT INCREASE	FURNISHED UNIT? (Y/N)	SEC 8 (Y/N)	RENT CONCESSIONS (Y/N)	
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MONTHLY RENT SCHEDULE:		<p>* Use additional sheets if necessary. <u>ALL COLUMNS AND SECTIONS MUST BE COMPLETED</u></p> <p>What utilities are included in rent? <input type="checkbox"/> Electricity <input type="checkbox"/> Cable TV <input type="checkbox"/> Gas <input type="checkbox"/> Garbage <input type="checkbox"/> Water <input type="checkbox"/> Heat</p> <p>Is the property subject to rent control? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If Yes, what is the current allowable increase per year? _____</p> <p>What has been your average monthly occupancy rate over the preceding 12 months? _____</p>									
MONTHLY LAUNDRY INCOME: (Must show on Income/Expenses)											
MONTHLY GARAGE INCOME:											
OTHER INCOME:											
TOTAL FROM OTHER PAGES:											
TOTAL GROSS MONTHLY INCOME:											

I (we) certify under penalty of perjury that the foregoing information herein is true and accurate.

BORROWER	DATE
BORROWER	DATE

Property Operating Statement

Property Street Address

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City	State	Zip
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Annual Income	2nd Year Prior	Prior Year	Current Year		Mos.
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Rental Income Collected					
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Total Income Collected					
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Annual Expenses	2nd Year Prior	Prior Year	Current Year
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Do not include one time capital expense items

Real Estate Taxes			
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Insurance			
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Utilities			
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Gas			
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Electricity			
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Water/Sewer			
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Trash			
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Maintenance			
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Pest Control			
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Gardener			
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Pool Service			
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Elevator			
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Cleaning Service			
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Building Rep. & Maint.			
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Painting & Decorating			
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Supplies			
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Administration			
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Administrative			
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Advertising			
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Telephone			
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Miscellaneous			
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Resident Manager			
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Security			
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Off-Site Management			
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Other			
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Total Expenses			
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Net Operating Income			
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Comments or Explanations:

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