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COMMERCIAL LOAN SUMMARY FORM

SOURCE

DATE	BROKER NAME	PHONE & EXT.
ORIGINATOR /CONTACT	E-MAIL ADDRESS	FAX
HOW DID YOU HERE ABOUT US?		CELL PHONE

BORROWER(S)

NAME	PHONE (WORK/HOME)
GUARANTOR	CELL PHONE
CREDIT SCORES IF KNOWN	FAX

BORROWER(S) WILL BE

☐ INDIVIDUAL(S) ☐ CORPORATION/LLC [TIN] _____

☐ PARTNERSHIP ☐ OTHER (PLEASE SPECIFY): _____

% OF CORPORATION OWNED BY BORROWER_____

PROPERTY

ADDRESS	CITY	STATE	ZIP

COMMERCIAL PROPERTY TYPE

☐ MIXED USE ☐ RETAIL/OFFICE ☐ MULTI-FAMILY/APTS ☐ WAREHOUSE ☐ RESTAURANT ☐ OTHER:

NO. OF UNITS	OCCUPANCY%	OWNER OCCUPANCY %	OTHER COMMENTS

OCCUPANCY	PRIMARY RESIDENCE
☐ BUSINESS OWNER OPERATED ☐ BUSINESS INVESTMENT	DOES BORROWER RESIDE IN PROPERTY? ☐ YES ☐ NO

PROPOSED LOAN TRANSACTION

LOAN PROGRAM	PURPOSE
☐ 2/6 MONTH PRIME ARM ☐ FIXED ☐ 5/6 MONTH PRIME ARM ☐ 1 YEAR ARM	☐ PURCHASE ☐ RATE/TERM REFI ☐ CASH-OUT REFI

REAL ESTATE VALUE	SOURCE OF VALUE	APPRAISAL DATE
$	☐ APPRAISAL ☐ SALES PRICE (IF PURCHASE) ☐ ESTIMATE	

REQUESTED LOAN AMT	LTV	CLTV	SOURCE OF 2ND	GIFTS
$	%	%		$

ORIGINAL COST (REFI)	USE OF PROCEEDS (REFI)	CLOSING COSTS:	CASH-OUT:
$ DATE PURCHASED _____/_____/_____	PAY OFF MTG: $_____	$_____ PAY OFF TAXES: $_____	$_____ PURPOSE OF C/O: _____

ORIGINATOR SIGNATURE

_____

COMMENTS