

Application Forms

Retail

Shopping Centers

Mix-Use Properties

Special Use property

Commercial Mortgage Application
Property Type: **RETAIL**

Borrower	_____
Application Date	_____
Originator	_____

Loan Information

Loan Name/Description _____

Recourse Preference Recourse Non-Recourse Negotiable

Loan Purpose Purchase Refinance Construction

If Purchase, Purch Price \$ _____ Closing Date _____

If Refinance, Loan Balance \$ _____ Interest Rate _____ % Type: Fixed _____ Variable _____

Cost of Recent Improvements \$ _____ Improvements Documented? Yes _____ No _____ Unknown _____

If Constr, Constr Cost+Land \$ _____ Completion Date _____

Borrower Information

Borrower Name _____

Borrower Type Individual Corp LLC Trust Ltd or Gen Prtnrshp Other _____

Primary Contact _____ Contact Email _____

Address _____ City _____ State _____ Zip _____

Phone () _____ Fax () _____

Net Worth \$ _____ FICO Score _____ Bankruptcy? Yes _____ No _____

Property Information

Property Name _____ No. of Bldgs _____

Land Area _____ No. of Pad Sites _____

Last Appraised Value \$ _____ Last Sale Price \$ _____

Last Appraisal Date _____ Date of Last Sale _____

Property Attributes Owner-occupied _____ Hwy Access _____ Hwy Visibility _____ Corner-located _____ Avg. Daily Traffic: L

No of Loading Docks _____ Dock Height _____ At Grade _____ Both _____ Don't Know _____

Surrounding Land Use Similar Ret _____ Higher Scale Ret _____ Lower Scale Ret _____ Office _____ Ind _____ Res _____ Other _____

Building Information

Building Address _____ City _____ State _____ Zip _____

Number of Stories _____ Year Built _____ Year Renovated _____ Overall Appearance: Avg _____ Above _____ Below _____

No of Covered Parking Spaces _____ Uncovered _____ Sprinklered _____ % HVAC _____ %

Est. Market Vacancy % _____ % Gross Building Area _____ SF Net Rental Area _____ SF

Rent Roll

Building Name _____ Rent Roll Date _____

No.	Tenant Name	Suite #	Tenant Type	Leased Area	Annual Rent	Lease Start	Lease Expire	Occupied Since	Options/Term	Borrower Affiliated	Reimbursements:			
											CAM/Util	Taxes	Insur	Mgmt
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														
25														

Retail property Purchase or Refinance
Commercial Loans

Check List of required information to complete business loan proposal.

Project Name _____

Borrower Name _____

Borrower Address _____

Phone _____ Cell _____ Fax _____

Date Received _____

Personal information

- _____ Signed 1003, officers owning more than 20% of the company
- _____ Copy of, S.S.,D.L., Resident Card or Citizen proof.
- _____ Credit report authorization by borrower's.
- _____ Personal financial statement dated within 30 days (no 1003)
- _____ Current year personal bank Accounts.
- _____ Last three years of personal income tax.
- _____ Assets documents support.
- _____ Current personal financial statement (30 days) for each partner stockholder and or officer owning more than 20% of the company.
- _____ Last 3 years personal income tax, on all 20% + owners
- _____ Three last months personal bank statements.
- _____ Financial statement of any affiliate business owned, operated, or 50% or more controlled by principals of this business.

Business & property information

- _____ Copy of corporate charter, articles & by law, assumed name.
- _____ Copy of business license.
- _____ Description / History of the company.
- _____ Resumes on key management.
- _____ Last three years business Income Tax
- _____ Current year of business profit and loss, dated within 30 days.
- _____ Current financial statement.
- _____ Current year business bank statements.
- _____ Schedule of account receivables, balancing to current statement.
- _____ Schedule of accounts payable, balancing to current statement.
- _____ Stock or inventory details.
- _____ List of fixed assets, make, model, serial number, depreciation.
- _____ Copy of deed, trust, or warranty deed.(refinancing)
- _____ Copy of the note.(refinancing)
- _____ Copy of the buy or sell agreement.(purchase)
- _____ Insurance, tax, and association information.
- _____ Appraisal of Real Estate, (older)
- _____ Purpose and benefit of the loan, and use of the loan proceeds.
- _____ Actual photo's of the property.
- _____ Rent roll.
- _____ Actual expenses.

Customer Signature

Rep. Signature