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**COMMERCIAL LOAN EXECUTIVE SUMMARY FORM**

Broker submitted by: \_\_\_\_\_ Broker address: \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

Purchase price of property: \$\_\_\_\_\_ Down payment amount: \$\_\_\_\_\_

Loan amount requested: \$\_\_\_\_\_

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Property appraised value if a refi: \$\_\_\_\_\_ Existing Mortgage(s) Balances: \$\_\_\_\_\_

Date purchased: \_\_\_\_\_ Amount paid for property: \$\_\_\_\_\_

Terms on existing note: \_\_\_\_\_

Purpose of Loan:  Lower rate  Balloon  Take Cash Out (how much)? \_\_\_\_\_

\*\*\*\*\*

Property name: \_\_\_\_\_ Specific property type: \_\_\_\_\_

Describe major improvements: \_\_\_\_\_

Maintenance or repairs needed: \_\_\_\_\_

Address of property: (describe location and area) \_\_\_\_\_

Number of units: \_\_\_\_\_ Year built: \_\_\_\_\_ Percent occupied: \_\_\_\_\_%

Gross potential income (on income properties) if fully occupied: \$\_\_\_\_\_

Gross income current YTD: \$\_\_\_\_\_ One year prior \$\_\_\_\_\_ Two years prior \$\_\_\_\_\_

Expenses current YTD: \$\_\_\_\_\_ One year prior \$\_\_\_\_\_ Two years prior \$\_\_\_\_\_

**(Do not include depreciation & interest expense)**

Borrowing entity:  individual  partnership  corporation  other \_\_\_\_\_

Credit history (circle one): A B C D Credit scores: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

**PLEASE DESCRIBE IN DETAIL WHAT THE BORROWER WANTS TO ACCOMPLISH:**

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