

LOAN SUMMARY SHEET

Date: _____

Property/Borrower Information

Borrowers Name: _____

Property Address: _____

City: _____ State: _____ Zip: _____

Borrower Type: ☐ Individual ☐ Trust ☐ LLC ☐ Partnership ☐ Corporation

Property Type: ☐ SFR (1-4) ☐ Condo ☐ 5+ Units

Type of Sale: ☐ REO ☐ Refinance ☐ Short Sale ☐ Foreclosure

Type of Transaction: ☐ Purchase ☐ Refinance

Purchase Price: \$ _____

Value: \$ _____

Loan Amount: \$ _____

Estimated COE: \$ _____

Projected Sale Price: \$ _____

Details of Needed/Completed Repair

Baths: \$ _____ Interior Trim: \$ _____ Kitchen: \$ _____

Exterior: \$ _____ Flooring: \$ _____ Landscaping: \$ _____

Painting: \$ _____ Roof: \$ _____

Escrow Company: _____

Title Company: _____

Contact: _____

Contact: _____

Phone No: _____

Phone No: _____

Rental Details

Gross Rent: \$ _____ Expenses: \$ _____

Schedule of Leases

Start Date: _____ End Date: _____

Security Deposit: \$ _____ Concessions: \$ _____

Comments: _____

PURPOSE OF LOAN / COMMENTS (special circumstances/conditions)

LOAN SUMMARY ITEMS

Please provide the following:

Loan Summary Sheet

Photographs of the property: Exterior, kitchen, bathrooms, bedrooms, roof (shingles), street view

If you already have these items, please provide them as well:

Appraisal, BPO, CMA

Title Report

Environmental Report

Lease Agreement