

Apartment Loan Summary Sheet

Contact Information:

Contact: _____ Phone: _____
Address: _____ Cell: _____
City, State: _____ Fax: _____
Zip: _____ Email: _____

Loan Details

Complete the appropriate section depending upon your transaction:

If Purchase:

Purchase Price: \$ _____
Seller Credit \$ _____
Requested Loan Amount: \$ _____ Earnest Money: \$ _____
Cash Down: \$ _____
Source of Down Payment: _____
1031 Exchange:? Yes No Drop Dead Date: _____

If Refinance:

Requested Loan Amount: \$ _____
Estimated Property Value: \$ _____
Original Cost: \$ _____ Date Acquired: _____
Existing Debt: \$ _____ Lender Name: _____
Capital Expenditures: \$ _____ Prepay Penalty: _____

Property Information

Property Name: _____

Property Address: _____

County: _____

of Tenants/ Units: _____

Year Built: _____

of Stories: _____

Total Rentable Sq. Ft.: _____

of Buildings: _____

Year Renovated: _____

of Parking Spaces: _____

Elevator: Yes No

Master Metered or Furnished: Yes No

Deferred Maintenance: Yes No

Sect. 8 or Corporate Tenants: Yes No

Property Comments: (Items for Lender to Consider)

Borrower Information

Date: _____

Borrowers Name: _____

Borrowing Entity: _____

of Key Principals: _____

Formed in what State: _____

Current Liquidity: \$ _____

Net Worth: \$ _____

Middle Credit Score: _____

Any past Credit Issues: _____

If so, explain: _____

Years Ownership/Management Experience: _____

Name of Management Company: _____

Who owns what percentage of Borrowing Entity?: _____

What loan terms do you desire? (Example: fixed rate period, amortization, prepayment penalty...)