

The Walden Group NY

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COMMERCIAL LOAN SUMMARY FACT SHEET TO CLIENT

Borrower: _____
Residence Address: _____
Social Security #: _____ Date of Birth: _____
Co-Borrower: _____
Residence Address: _____
Social Security #: _____ Date of Birth: _____
Subject Property: _____
Multi-Family: _____ Mixed-Use: _____
Residential Units: _____ # Commercial Units: _____
C/O: _____ Occupancy %: _____
Owner Occupied: _____ Investor: _____
Loan Amount: _____ Rate/Term: _____
Purchase: _____ Refinance: _____
Market Value: _____ Loan to Value: _____
Use of Funds: _____

<u>Apt./Store</u>	<u>Tenant</u>	<u>Rent</u>	<u>Lease Expiration</u>	<u>Sq. Feet</u>
Unit 1	_____	_____	_____	_____
Unit 2	_____	_____	_____	_____
Unit 3	_____	_____	_____	_____
Unit 4	_____	_____	_____	_____
Unit 5	_____	_____	_____	_____
Unit 6	_____	_____	_____	_____
Unit 7	_____	_____	_____	_____
Unit 8	_____	_____	_____	_____
Unit 9	_____	_____	_____	_____
Unit 10	_____	_____	_____	_____

Gross Annual Rental Income: \$ _____
Less Vacancy Factor (5.00%): \$ _____
Effective Gross Income: \$ _____

OPERATING EXPENSES:

Real Estate Taxes: \$ _____
Insurance: \$ _____
Management Fee (5.0% E.G.I.): \$ _____
Heat: \$ _____
Electric: \$ _____
Water/Sewer: \$ _____
Repair/Maintenance: \$ _____
Rubbish Removal: \$ _____
Snow Removal: \$ _____
Landscaping: \$ _____
Janitorial: \$ _____
Elevator Maintenance: \$ _____
Reserves: \$ _____
Other: \$ _____

Total Expenses: \$ _____
Net Operating Income: \$ _____
Debt Service Coverage: \$ _____

Existing Mortgage:

Refinance: Date of Purchase: _____
Cost of Improvements: _____
Description of Improvements: _____

Credit Profile: Excellent: _____ Good: _____ Fair: _____ FICO: _____