

Please complete and return to your Regional Sales Manager. If you don't have one, please send to [info@ameridund.us](mailto:info@ameridund.us) and you will be assigned one.

### BROKER INFORMATION

Name \_\_\_\_\_  
 Company \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_

### COMMERCIAL REAL ESTATE (Indicate): CCL 100 CCL 110 CCL 200 CCL 400

- Current Rent Roll** – (Yours or use the attached form)
- Property Operating Statements** – Last two years and YTD (Yours or use the attached form)
- Owner Occupied Properties** – Last two years tax returns and YTD P&L for operating business
- Purchase Contract** – (If the loan is for the purchase of property)
- Overview Of Business Plan** – (CCL 400 Only)

### INVESTMENT 1-4 UNIT RENTAL PROPERTY (Indicate): CCL 300

- Current Lease** – (If occupied)
  - Property Operating Statements** – Last two years and YTD (Yours or use the attached form)
  - Purchase Contract** – (If the loan is for the purchase of property)
  - FNMA 1003 Form** – (If complete and available, send a 1003 or complete 1-4 Unit Borrower Application.)
- Borrower must OWN and OCCUPY a separate residence of greater value than subject property and have owned investment real estate for at least one year.**

### BORROWER INFORMATION

If entity or company own the Property, list here.	Personal Residence City/State	Own?	Liquidity	Net Worth	Credit Score
_____	_____	_____	_____	_____	_____
List owners of either entity/company or Property	Ownership %	Personal Residence City/State	Liquidity	Net Worth	Credit Score
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**Yes Have any Borrowers or Guarantors:**

Had a property foreclosed in last 3 years?	Yes	Are any Borrowers or Guarantors foreign nationals?
Filed for bankruptcy in last 5 years?		Any Borrower or Guarantor missed mortgage payments in last 12 months?
Failed to file Federal tax returns for last 3 years?		Are there back real estate taxes owed on subject property?

### IF "YES" TO ANY QUESTION ABOVE, PLEASE EXPLAIN. ANY UNIQUE ASPECTS OF THE DEAL?

### SUBJECT PROPERTY INFORMATION

Address _____	<b>Property Type</b>	1-4 Unit Residential Rental
City _____ State _____ Zip _____	Multifamily	Retail Mixed-Use
Building SF _____ # of Units _____ Occupancy _____ %	Industrial	Office Self-Storage
Does the owner occupy any portion of the property? No Yes _____ O/O SF	Mobile Home Park	Other _____
Does the property have:	Underground or above ground storage tanks	Automotive repair uses
	Hazardous material handling / licensing	On-site dry cleaner plant
		Ongoing environmental remediation
		A prior Phase 1 report available

### LOAN INFORMATION

Type in Loan Amount, Desired Rate, Gross Income and Expense to generate payment and DCR

Loan Amount Requested \_\_\_\_\_

Desired Rate \_\_\_\_\_ Amort. \_\_\_\_ (mos.) YSP% \_\_\_\_\_

Current Estimated Value \_\_\_\_\_

Monthly Pmt \_\_\_\_\_ Annual Pmt \_\_\_\_\_

Annual Gross Income \_\_\_\_\_

Annual Operating Expense \_\_\_\_\_

Net Operating Income \_\_\_\_\_

LTV \_\_\_\_\_ **DSCR** \_\_\_\_\_ CAP Rate \_\_\_\_\_

**Purchase**

Current Sales Price \_\_\_\_\_

Target Closing Date \_\_\_\_\_

1031 Exchange Yes

**Refinance – Rate and Term** or **Refinance – Cash Out**

Current Loan Balance \_\_\_\_\_ Current Rate \_\_\_\_\_

Loan Maturity Date \_\_\_\_\_ Pre-Pay? Yes No

Current Lender \_\_\_\_\_

Acquisition Price \_\_\_\_\_ Mo/Yr Acquired \_\_\_\_\_

### COMMENTS - PERTINENT INFORMATION ABOUT THE DEAL

For Cash Out, please state what the funds will be used for:

Estimated cash-out available \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estimated cash-out before closing costs and impounds \_\_\_\_\_





PROPERTY ADDRESS	CITY	STATE	ZIP CODE

ANNUAL INCOME	2ND YEAR PRIOR	PRIOR YEAR	CURRENT YEAR	MOS.
Rental Income Collected				
Total Income Collected				

ANNUAL EXPENSES	2ND YEAR PRIOR	PRIOR YEAR	CURRENT YEAR	MOS.
<i>Do not include one time capital expense items</i>				
Real Estate Taxes				
Insurance				
<b>UTILITIES</b>				
Gas				
Electricity				
Water/Sewer				
Trash				
<b>MAINTENANCE</b>				
Pest Control				
Gardener				
Pool Service				
Elevator				
Cleaning Service				
Building Rep. & Maint.				
Painting & Decorating				
Supplies				
<b>ADMINISTRATION</b>				
Administrative				
Advertising				
Telephone				
<b>MISCELLANEOUS</b>				
Resident Manager				
Security				
Off-Site Management				
Other				
<b>TOTAL EXPENSES</b>				
<b>NET OPERATING INCOME</b>				

COMMENTS OR EXPLANATIONS