

Executive Summary Questions

Borrower Name: _____

Project Name: _____

Target Closing Date: _____

Summary of Borrower Background and Experience

Project Examples (provide past examples with addresses)

Website or LinkedIn Profile: _____

Individual Guarantor Info (Per Guarantor)

How many years has Guarantor been in the real estate/construction industry?: _____

Summary of Guarantor Background and Experience (if different than borrowing entity)

Project Examples (please provide past examples with addresses) (if different than borrowing entity)

Builder Information

Builder Name: _____

Is Builder part of the borrowing entity or same as Guarantors?

If there is development on this project, please include Name, Main Contact, Phone and Email

Executive Summary on Builder

How many units has the builder completed in the last 18 months?: _____

Project Examples (please provide past examples with addresses)

Builder's Website or LinkedIn Profile: _____

Project Info

Description of Units please provide a breakdown of each plan type:

Are there any unique selling features and/or are there any community amenities?

Does the project have any presales or wait list? _____

What is the permit status of the project? _____

If this loan includes horizontal development, please describe scope of work needed.

Market Description - especially tell us about any new population drivers

3rd Party Information

What is the status of Title? _____

Title Contact & Escrow/Closer Contact (include name, phone, email)

Preferred Title Company

Do you have a previous title policy? (if so please provide) _____

Has work started on project? _____

Insurance Contact (General Liability and Builders Risk (include name, phone, email))

Have you ordered an appraisal? _____