

PRICING INTAKE FORM

PROJECT INFORMATION

PROJECT NAME: _____

PROJECT ADDRESS (STREET, CITY, STATE, ZIP): _____

LOAN PROGRAM: _____ PRODUCT TYPE: _____

LOAN AMOUNT REQUESTED: _____ EXIT STRATEGY: _____

LOAN TERM (MONTHS): _____ LOAN CLOSING DATE: _____

IF PURCHASE

PURCHASE PRICE: _____ EXPECTED CLOSE DATE: _____

IF REFINANCE

PAYOFF AMOUNT: _____ ORIGINAL PURCHASE DATE: _____

ORIGINAL PURCHASE PRICE: _____

CURRENT STATUS

AS IS VALUE: _____ WHAT IS CURRENTLY ON THE PROPERTY: _____

COST PAID TO DATE, IF ANY (DO NOT INCLUDE INTEREST PAYMENTS ON EXSITING DEBT): _____

PERMIT STATUS: _____ HOW MANY PARCELS IS THE PROPERTY CURRENTLY: _____

HORIZONTAL INFORMATION

NUMBER OF LOTS BEING DEVELOPED (IF APPLICABLE): _____

DEVELOPMENT BUDGET AMOUNT (HORIZONTAL WORK): _____
(DO NOT INCLUDE FINANCING OR LAND COST)

FINISHED LOT VALUE: _____

VERTICAL INFORMATION

NUMBER OF UNITS BEING BUILT: _____ FINISHED VALUE OF UNITS: _____

VERTICAL BUDGET AMOUNT: _____
(DO NOT INCLUDE FINANCING OR LAND COST)

NUMBER OF UNITS STARTING: _____ NUMBER OF DAYS BETWEEN STARTS: _____

BUILD TIME PER UNIT (MONTHS): _____ SALE TIME PER UNIT (MONTHS): _____

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BORROWER INFORMATION

BUSINESS ENTITY NAME: _____

NAME OF GUARANTOR(S): _____

CREDIT SCORE(S): _____

NUMBER OF SIMILARLY COMPLETED PROJECTS IN THE PAST 18 MONTHS: _____

NUMBER OF YEARS EXPERIENCE IN INDUSTRY: _____

ESTIMATED NET WORTH: _____

Helpful Items to Collect If Available:

- Appraisals
- Builder Proformas/ Cash Flows
- Project Plans
- Project Rent Rolls (if Multifamily or Build to Rent)