

Application Checklist

INCOME PROPERTY

BUSINESS
OWNER
OCCUPANT

Required Information

Individual

Entity
Borrower

Individual or
Business Entity
Borrower

Financial Information

Three years tax returns, including all schedules and K-1s (applicant and guarantor)

Three years fiscal year end financial statements, including balance sheet and income statement (applicant and guarantor)

Personal financial statement (guarantor)

Interim financial statement (applicant)

Personal financial statement (applicant)

MF only - if refinancing, 12 months most recent loan statements

Property Information

Purchase contract (if property is being purchased)

Three years income and expense statement (property)

Rent roll

Tenant leases

CAM budget Aging schedules for rents receivable (if available)

Property survey (if available)

Other Information

Loan application

Business entity documents

Trust documents - if applicable (individual applicant and guarantor)



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