

Soft Money Loan Application

Purpose of Loan		Loan Term	
<input type="checkbox"/> Purchase <input type="checkbox"/> Refinance		<input type="checkbox"/> 6 Months <input type="checkbox"/> 12 Months	
Purchase Price		Loan Amount Requested	
\$		\$	
Acquisition Date		Target Closing Date	
Accepted Purchase and Sale Agreement (purchase only)		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Closing Agent			
Name:		Email:	Phone:
Insurance Agent			
Name:		Email:	Phone:

Subject Property

Property Address		Property Type	
Address:		<input type="checkbox"/> Single-Family Residence <input type="checkbox"/> Condo <input type="checkbox"/> Townhome <input type="checkbox"/> 2-4 Plex	
City:			
State:	Zip:		
Property Access			
Contact Name	Contact Email	Contact Phone Number	
Property Access Instructions			

Project Details

Summary of Exit Strategy		
Rehab funds in additional draw	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Summary of Plans for Repair		
Estimated Cost of Rehab	Estimated Days Required	After Repair Property Value
\$		\$

Borrower

Individual Borrower

Applicant / Borrower Information		
Legal Name:	SSN:	DOB:
U.S. Citizen or Permanent Resident? <input type="checkbox"/> Yes <input type="checkbox"/> No	Email:	
Marital Status:	Phone #:	
Home Address:		

Entity Borrower

Business/ Borrower Information				
Entity Name:	EIN:			
Entity Address:	State of Incorporation:			
Entity Type:				
Entity Member I (at least 49% ownership or authority to manage)				
Entity Name:	Phone #:			
Entity Address:				
SSN:	DOB:	Email:		
Entity Member II (at least 49% ownership or authority to manage)				
Entity Name:	Phone #:			
Entity Address:				
SSN:	DOB:	Email:		

Borrower Finances

Amount of Liquid Assets	Net Worth
\$	\$
Monthly Income	Monthly Expenses
\$	\$

Borrower Properties

Total # of Properties Owned		Total Property Assets		Total Property Liabilities						
		\$		\$						
# Purchases Ever	# Purchases Last 12 mo.	# Purchases Last 6 mo.	Average Purchase Price							
			\$							
Describe Experience with Similar Projects										

Guarantor

Is there a guarantor on this loan? ☐ Yes ☐ No

Personal Information		
Legal Name:	SSN:	DOB:
U.S. Citizen or Permanent Resident? <input type="checkbox"/> Yes <input type="checkbox"/> No	Email:	
Marital Status:	Phone #:	
Home Address:		



Required Documents

Property

- Purchase Sale Agreement
- Rehab Scope of Work (template available)

Borrower

- Articles of Organization
- Operating Agreement
- Certificate of Good Standing
- 3 Months Bank Statements
- Voided Check for ACH Debit
- Schedule of Real Estate Owned and Past Projects (template available)

Guarantor

- Driver's License
- 3 Months Bank Statements
- Schedule of Real Estate Owned and Past Projects (template available)