

# DH Capital:

## Commercial Intake Worksheet

Broker / Borrower Name: \_\_\_\_\_ Broker  Borrower   
Mobile Phn: \_\_\_\_\_ Work Phn: \_\_\_\_\_  
Email: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_

Loan Amount Requested: \$ \_\_\_\_\_ Borrower Type (Indiv, business, etc): \_\_\_\_\_  
Loan Purpose: \_\_\_\_\_ Borrower Credit: \_\_\_\_\_  
 Purchase  Construction / Perm  Refinance

If refi, purpose or use of proceeds: \_\_\_\_\_ Acquisition Date: \_\_\_\_\_ Acquisition Cost: \_\_\_\_\_

Building Type: \_\_\_\_\_ Value / Purchase Price: \_\_\_\_\_ Bldg Age: \_\_\_\_\_  
 Generic Use  Semi-generic  Mixed Use  Special Purpose

Owner Occupied  Non-Owner Occ # of Tenants: \_\_\_\_\_

Owner Occ % \_\_\_\_\_ # of Units \_\_\_\_\_ If Owner Occupied: Years in Business: \_\_\_\_\_

Property Location: City: \_\_\_\_\_ State: \_\_\_\_\_

### Property Status / Condition:

Fully Occupied  Vacant  Under Const./ Renov.

LTV Requested \_\_\_\_\_ Down Payment Available (if purch): \$ \_\_\_\_\_

### Notes:

### Step 1: Complete Intake Worksheet

### Step 2: Email Intake Worksheet to: [eric.tran@dhcapitals.com](mailto:eric.tran@dhcapitals.com) or call

### 888-334-9039 M5 Quote Details:

Rate: \_\_\_\_\_ Amort: \_\_\_\_\_ Term: \_\_\_\_\_ LTV: \_\_\_\_\_  
Points: \_\_\_\_\_ Turnaround: \_\_\_\_\_ App Needed for CLA / LOI: \_\_\_\_\_

### DHCapitals Use Only:

Recommended Programs: \_\_\_\_\_  
Next Follow up Steps: \_\_\_\_\_  
App Sent: \_\_\_\_\_ Date: \_\_\_\_\_  
Add to CRM: \_\_\_\_\_ Date: \_\_\_\_\_