

Loan Package Checklist

Property
Address
City State, Zip

Order	Document Name
1.	Cover page
2.	Executive Summary and Underwriting Analysis
3.	Property Photos
4.	Broker Information
5.	Borrower Information
6.	Property Information
7.	Operating Statement Builder
8.	Quick Calculator Underwriting Software
9.	Personal Financial Statement – (Net worth)
10.	Borrower(s) Credit Report (Optional)
11.	Borrower(s) Credit Authorization and Release
12.	Fee Agreement
13.	Two Years of Corporate Tax Returns (All Schedules & Attachments)
14.	Most Recent Business Interim Financial Statement (within 90 days)
15.	Borrower Resume or Experience
16.	Two Year of Personal Tax Returns
17.	Purchase Agreement
18.	Rent Roll / Lease
19.	Environmental Documentation (Upon Lender Request)
20.	Site Inspection (Upon Lender Request)
21.	Appraisal (Upon Lender Request)
22.	Title (Upon Lender Request)
23.	Survey (Upon Lender Request)
24.	Deed / Note / Mortgage
25.	Proof of Insurance on Property