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| **SHB Investment Real Estate Deal Summary** | |
| **To be completed by investor or broker regarding new loan request and subject property to be financed.** | |
|  | Date: |
| **Borrower (principal)** |  |
| Borrower's name (principal) |  |
| Borrower's telephone number |  |
| Borrower's email |  |
| Borrower's most recent credit score(s) |  |
| Is/will the subject property be titled in borrower's personal name or an entity? |  |
| Entity name (if applicable) |  |
| Borrower's percentage of ownership in entity |  |
| Are there any partners? |  |
| How many? |  |
| Does borrower own his/her primary residence? |  |
| How long owned current primary residence? |  |
| Does borrower own other investment properties? |  |
| # of investment properties currently owned |  |
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| **Subject Property** |  |
| Is this property raw land, rural, special purpose, or a construction project? |  |
| Subject property address (street/city/state) |  |
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| Exact property type (SFR, mixed use, apartment building, office, retail, etc) |  |
| How many tax parcels are there for the subject property? |  |
| Total number of buildings |  |
| Total number of units |  |
| Estimated site size (in acres) |  |
| What is the subject property currently being used for? |  |
| What does the borrower intend to use it for? |  |
| Does borrower plan to occupy subject property? |  |
| Are there currently tenants in the subject property? |  |
| Percentage of occupancy of subject property |  |
| Current total gross monthly rental income on subject property |  |
| Are there leases in place with existing tenants? |  |
| Purchase or refinance transaction? |  |
| If purchase, purchase price |  |
| If purchase, is there a signed purchase contract between buyer/seller? |  |
| If purchase, how much does borrower have for down payment/closing costs? |  |
| Estimated current market value of subject property |  |
| Basis for this value? (Zillow, LoopNet, recent appraisal, etc) |  |
| If refinance, total amount of existing liens |  |
| If refinance, how long has borrower been on title? |  |
| If refinance, who is on title? |  |
| Is the strategy to flip & sell or buy & hold the subject property? |  |
| Does the property need any repairs? |  |
| Cost in total repairs anticipated |  |
| What repairs will be done? |  |
| Is the property market ready for leasing? |  |
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| **Finance Needs** |  |
| Loan amount desired |  |
| Minimum acceptable loan amount |  |
| How soon would borrower like to close on this loan? |  |
| What is more important - speed of closing, rate/term, documentation required? |  |
| Is a short term or longer-term loan preferred? |  |
| Has borrower been turned down for financing elsewhere? |  |
| Why? |  |
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| **Comments/Important to Know** |  |
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**Upon completion, please email this summary to us for review.***We look forward to working with you and value your business!*