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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 |   |
|  |  |
| **Subject Property** |  |
| Is this property raw land, rural, special purpose, or a construction project? |   |
| Subject property address (street/city/state) |   |
|   |
| 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? |   |
|  |  |
| **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? |   |
|  |  |
| **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!*