



CONSULTING
& TAX SOLUTIONS
NAVIGATING BUSINESSES INTO GROWTH

Documents Needed to Initiate The Loan Process:

- Signed Broker Agreement (will be issued once the following requirements have been met)
- Please include borrower's best estimate of credit score
- Copy of borrower's I.D. (state issued DL or Passport)
- Copy of purchase contract if it's a purchase
- Copy Mortgage Payoff Statement if it's a refinance
- 3 Most recent bank statements from the account used for this transaction

***** All attachments that apply must be completed 100%**

[Loan Application \(1003\)](#)

[Executive Summary](#)

[Personal Financial Statement](#)

[Real Estate Resume](#)

[Light Rehab Budget \(1-4 unit properties\)](#)

[Rehab Budget \(heavy rehab & large projects\)](#)

[Commercial Rent Roll](#)

[Title Co. Form](#)