



3655 Bonita Beach Rd., Suites 3 & 4, Bonita Springs, FL 34134 (PH) 239-948-9377

Finance Request Summary

Please note this Finance Request Summary and your Executive Summary is the potential Investors first look at your project. Investors review numerous financial requests weekly, for this reason they require us to initially submit an overview of no more than 1 to 10 pages. **Please type your answers directly on the form and attach the additional supporting documents listed on page 2.** Your answers need to be brief, but give enough detail to grab the Investor’s attention. You may save all answers directly to this document. Email the completed form and all attachments you are submitting to us in the original Word Document Format.

Principal & Corporate Contact Info:

- Name:**
- Company name or dba:**
- Address:**
- City:**
- State & Zip:**
- Phone number:**
- Cell number:**
- Fax number:**
- Email address:**
- Web address:**

Type of Financing You Are Seeking: (Mark all that apply)

<input type="checkbox"/> Acquisition & Development <input type="checkbox"/> Construction <input type="checkbox"/> Refinance <input type="checkbox"/> Cash out Refinance <input type="checkbox"/> Bridge <input type="checkbox"/> Mezzanine	<input type="checkbox"/> Equity Partner <input type="checkbox"/> Joint Venture <input type="checkbox"/> Hard Money <input type="checkbox"/> Stand-By Letter of Credit <input type="checkbox"/> Other, please explain:
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Brief Project Description:

Finance Amount Requested:

Capital Invested Into The Project To Date: (The lender will request documentation to substantiate your capital invested – here the lender is looking for “skin in the game” amount)

Current Value of Project : (If applicable list any loans/liens outstanding on property)

Projected Ending Value of the Project:

The following items found below marked with an “X” are a requirement for the Investor:

Note: Other information may be required by the Investor. Please be prepared to supply this documentation in a timely manner.

<input checked="" type="checkbox"/> Executive Summary (1- 10 pages)	<input type="checkbox"/> Personal Financial Statements for guarantors
<input checked="" type="checkbox"/> Business Plan – going out 3 to 5 years	<input type="checkbox"/> Current Personal or Business Credit Report
<input checked="" type="checkbox"/> Marketing Plan	<input type="checkbox"/> Business Tax Returns – for 3 years
<input checked="" type="checkbox"/> Bio’s for all management personnel	<input type="checkbox"/> Other:
<input checked="" type="checkbox"/> Pro-formas – (Projected Cash Flow)	
<input checked="" type="checkbox"/> Detailed Exit Strategy	
<input checked="" type="checkbox"/> Detailed Use of Funds	

**** The investor may request further documentation particular to your project. ****

NOTE: By completing this form, the applicant is verifying all information contained in this Finance Request Summary and in the accompanying statements and documents provided is true, complete, and correct. The applicant agrees to notify all parties immediately of any material changes in this information. It is further agreed that, whether or not the loan request applied for is approved, the applicant will pay for any and all costs incurred such as appraisals, survey, inspections, etc. which may be required in the processing of the applicants loan request. Payment for the above costs incurred in the processing the loan request will be paid in advance via cashier check. The applicant authorizes the lender to contact any bank and trade creditors it deems necessary without further notice, including, but not limited to, Dunn & Bradstreet reports or information from Credit Bureaus.