

Multifamily

Small Balance Loans



Document Checklist:

Sizing & Pricing

- Operating Income Statement
- Rolling Rents Statement
- Full Property Address

Rate Lock

- Signed Term Sheet and Application Deposit
- Credit Release Authorization*
- Insurance Release Authorization*
- W-9 (Tax ID Form)*
- Financial Statement for Borrower
- Current Rolling Rent with Unit Type and Lease Date
- Operating Income Statement for Previous Three Years and Trailing Twelve Months

Closing

- Organizational Chart & Biography / Resume
- Forms 1115 & 1116
- Proforma Operating Budget for Next Twelve Months
- Property Management Agreement
- Capital Improvements Made in Last Twelve Months
- Purchase and Sale Agreement
- Certificate of Occupancy



For more information please contact:

Mike Simas | Direct: (951) 271-8274

Email us at: multifamily@swmc.com

*** Attached to Term Sheet / Only Signature Required.**



EQUAL HOUSING OPPORTUNITY

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