



## COMMERCIAL PROPERTY ACQUISITIONS & REFINANCES

- *Letter from client as to mortgage amount, terms and conditions requested*
- *Completion of the Broker Executive Loan Summary-(by CASCADE)*
- *Color photographs – external & internal of the site*
- *Total breakdown of project costs in and other fees*
- *Resume of client/applicant/s*
- *If they have a new business plan, submit that also*
- *Projected (3) years income & expense statements*
- *Plans and preliminary specs for the project*
- *Cost breakdown for the equipment in the facility*
- *Updated financial statement of the borrowing entity*
- *Market and area description, including location maps*
- *Property description and site map*
- *General town and county map with site location outlined.*
- *Copies of all existing licenses or municipal approvals for operation*
- *Personal & updated financial statement of the borrowers*
- *If there is current debt on the site, indicate lender and terms*
- *Copy of environmental study – if available*
- *Name/address/phone, of legal and accounting firms that will represent client*
- *Executed mortgage placement agreement with retainer*
- *Any other data that you consider important to the approval process*

*Please note that all documents are to be signed and dated by applicant or designated person for the applicant, prior to submission to our firm for presentation to the lender.*