

Buyer's Preliminary Financing Worksheet

Date: _____

Borrower: _____

Property: _____

This worksheet is designed to assist you in beginning the process of applying for a commercial real estate loan. This information will allow you to organize your personal financial information and to evaluate your potential for purchasing commercial real estate. In addition, it will enable the underwriter to complete the preliminary review of your loan application in a timely manner. A more detailed Underwriting Checklist will be provided to you at a later date. All documents should be forwarded to:

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Proposed Purchase Price: _____

Down Payment: _____

Loan Amount: _____

Prior experience owning / managing commercial income property

Describe _____

Financial Statement (prepare financial statement)

Total Assets	\$ _____
Total Liabilities	\$ _____
Total Net Worth	\$ _____

Liquid Assets

Cash / Marketable Securities	\$ _____
Balance in 1031 Account	\$ _____
TOTAL LIQUID ASSETS	\$ _____
LESS Down Payment and Closing Costs	\$ _____
Liquid Assets After Close of Escrow	\$ _____

Other Assets

Equity in Real Estate	\$ _____
Other _____	\$ _____
_____	\$ _____
Personal Property	\$ _____

Personal Income

Borrower	\$ _____
Co-Borrower	\$ _____

Business Income

\$ _____

Property Management Plan

Professional Manager:

Self-Manage:

Prepare Real Estate Schedule – see page 2
