

**SELECT LOAN PROGRAM:**

12-Mo. Fix & Flip

12-Mo. Purchase

12-Mo. Cash Out Refi

2+1 Rental (24M +1YR-XT)

2+1 Rental Refi

30YR Rental Purchase

30-YR Cash Out Refi

30-YR Rate Term Refi

Please provide the following information and I will provide you an estimation of loan terms. If you have any questions or concerns, please contact us. Email this completed form to: [Steve@LoanDaddy.ai](mailto:Steve@LoanDaddy.ai). Phone: (503) 551-8690.

**REQUESTED INFO (Needed to Price Out All Loan Scenarios)**

Borrower Name/Business Entity

Estimated Credit Score

How Many Flips Completed in the Last 3 Years

How Many Rentals Owned in the Last 3 Years

Borrower's Multifamily (5+) and Mixed-Use Experience (Overall & in Nearby Area)

Borrower's Short-Term Rental Experience (Overall)

Borrower's Liquidity Position and Overall Net Worth (Estimate)

Borrower's Total Number of Other Mortgages

Property Address

Loan Type (Purchase, Fix & Flip, Refi, Cash-Out)

Property Type (SFR, 2-4 Unit, Condo, etc.)

Number of Units (Max Allowed is 20, No Mixed Use)

Submarket Occupancy (If Available)

Purchase Price:

As-Is Value (If Different from Purchase Price)

Mortgage Balance (If Refi)

Original Purchase Price and Date (If Refi)

Annual Property Taxes

Annual Insurance Premium

Gross Potential Annual Rent

Current Occupancy of Subject Property

Property Expenses (Utilities, Property Management,

Exit Strategy

**FIX & FLIP (Fill in These Fields)**

Rehab Budget

Projected ARV

Number of Floors

Will Square Footage be Added to the Property?

**30-YEAR PRODUCT (Fill in These Fields)**

Previous Rehab Completed (If Applicable)

Is the Property Managed by Professional  
Property Management Company?

*(Borrower's experience is determined within the last 3 years as properties flipped or held as rental properties deeded in borrower's business name or personal name. Experience is not necessary, however terms of Loan to Value and interest rates are based on real estate investment experience)*

*\*Please note, loans will be made to a business entity and personally guaranteed by the individuals of the entity.*