



CMB Loan #

CMBCCommercialMortgage.com Needs Analysis Interview Form

Lender :

Atten :

From: _____

Date: _____ Phone: _____ Email/Fax: _____

Borrower(s): _____ ; _____

Borrower(s) FICO Score(s): _____ Equity/Cash in Project: _____

Personal Net Worth: _____ Liquidity: _____ Experience: _____

Property Address: _____

Property Type: _____ Owner Occupied: Y/ N

Building Size: _____ Number of Units: _____ Occupancy: _____

Loan Request: _____ Estimated Value: _____ LTV: _____

Date Purchased: _____ Purchase Price: _____

Property Income: _____ Expenses: _____ NOI: _____

Purpose of Loan:	(Select all that apply) <input type="checkbox"/> Purchase <input type="checkbox"/> Re-finance <input type="checkbox"/> Construction
Desired Loan:	<input type="checkbox"/> Hard/Fast or <input type="checkbox"/> Best Rate
Income and Assets:	<input type="checkbox"/> Full Doc or <input type="checkbox"/> Stated Other _____

Refinance _____ *Purchase* _____ *Expenses* _____

Pay off mortgage: _____ Purchase Price: _____ Taxes: _____

Taxes: _____ Down Payment: _____ Insurance: _____

Cash Out: _____ Secondary Financing: _____ Water & Sewer _____

Other: _____ Amount Financed: _____ Electricity: _____

Closing Costs: _____ Closing Costs: _____ Repair & Maint: _____

Loan Request: _____ Loan Request: _____ Trash: _____

Exit/Payoff Strategy: _____ Misc: _____

Summary of Facts:

