



Commercial Mortgage Advisors

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Loan Checklist

1. Executive Summary of the Project and Financing Request
2. Borrower's Web Site
3. Project Web Site (if available)
4. Borrowing entity's name (US single asset entity)
5. Borrower/Sponsor resume with project development or owner/operator background
6. Borrower/Sponsor current personal and company financial statements
7. Borrower/Sponsor most recent credit report, if available
8. Borrower/Sponsor tax returns for last 3 years
9. Rent Roll: Lessee name, suite number, square footage leased, annual rent, expenses reimbursed, lease start and expiration dates, renewal options and rent escalations
10. Pro-forma profit and loss for a proposed project
11. Pro-forma profit and loss statement for current year
12. Profit and loss statements — year-to-date & previous 3 years
13. Architectural Rendering (if available)
14. Area map
15. Aerial photograph (if available)
16. Site plan
17. Survey
18. Photographs of subject property — front, rear and sides
19. Franchise agreement
20. Copy of existing appraisal and/or Feasibility Study (if available)
21. Property Brochures and/or listing information
22. Existing loan information (lender name, original loan amount, loan balance, interest rate, maturity date, etc.)
23. Sources & Uses of Funds (land, hard & soft cost)
24. Use of proceeds breakdown (refinance, existing loan balance, capital improvements, etc)
25. Project leases and/or lease briefs
26. Demographics
27. Letter of Intent or Sales Contract (Please specify)
28. Construction Cost Breakdown
29. Plans and Specifications
30. Septic Tank or Sanitary Sewer (Please specify)
31. Existing or prior Environmental Phase I or Phase II (if an NFA was required, provide a copy)

**PLEASE PROVIDE PDF OR EXCEL DOCS WHENEVER POSSIBLE
NOT ALL ITEMS ARE NEEDED FOR A PRELIMINARY QUOTE**