



Owner User Loan Quote Form
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CONTACT: _____ E-MAIL: _____
 COMPANY _____
 PHONE: _____ FAX: _____
 PROJECT NAME: _____
 PROPERTY ADDRESS _____
 CITY, STATE, ZIP CODE _____
 BORROWING ENTITY: _____ **Credit Score:** _____

PURCHASE PRICE / **VALUE \$ _____ (**If Refinance)
 REQUESTED FINANCING \$ _____ % LTV
 SECONDARY FINANCING \$ _____ % LTV
 TOTAL FINANCING \$ _____ % LTV
 CASH DOWN PAYMENT \$ _____ % LTV
 **ACQUISITION PRICE / DATE \$ _____ **If refinance, when did the borrower acquire the property?, What price? Existing Financing?
 *EXISTING FINANCING \$ _____

QUESTIONNAIRE

- (1) What is the property used for? _____
- (2) What is the business profile for the owner-user? _____
- (3) How many years of experience does the owner user have in their business? _____
- (3) Is this a single tenant or multi-tenant property? _____
- (4) If a Multi-tenant property, how many tenants? _____ (complete lease summary below)
- (5) What is the Net Rentable Area of the property? _____ (Estimate of total rentable square feet)
- (6) How much of the total space is owner-user? _____
- (7) What is the potential market rent for the owner-user space? _____ (If available)
- (8) If Multi-tenant, what type of leases are being utilized? (Gross, Net, etc.) Who pays what expenses? _____

TENANT LEASE SUMMARY:	RENT	SQ FT	START DATE	END DATE	LEASE TYPE
<i>TENANT NAME</i>					
	\$				
	\$				
	\$				
	\$				
	\$				

Total Number of Suites: _____

**Total Current Rents or Market Rents:

- CAM: _____
 Utility Re-imbusement: _____
 Other: _____
 Other: _____

TOTAL MONTHLY INCOME: _____

TOTAL GROSS POTENTIAL INCOME: _____

\$
\$
\$
\$
\$
\$
\$

Operating Expenses

- Taxes \$ _____
 Insurance \$ _____
 Utilities \$ _____
 Repairs / Maint \$ _____
 Administration \$ _____
 Mgt-Off Site \$ _____
 Janitorial \$ _____
 Landscaping \$ _____
 \$ _____
Total: \$ _____

****Market Rent Analysis:** The realtor that is selling the subject property should be aware of the potential income that the property can produce. Please consult with the listing agent to get an accurate estimate for potential rent and lease types (i.e. gross, net, etc.)

INDIVIDUAL TAX RETURN (1040'S) SUMMARY

	Prior Yr. 3	Prior Yr. 2	Prior Yr. 1	Current YTD P & L
Wages, Salaries				
Alimony Received (Paid)				
Interest				
Dividends				
IRA, Pension, Soc. Sec. Distributions				
Capital Gains (Losses)				
Rental (Sch E) / Royalty Cash Flow				
Depreciation adjustment for Net Rental Income				
Business / Partnership / Corporation Cash Flow				
Depreciation adjustment for Corporation Income				
Other Cash Inflow / Outflow				
Cash Flow Before Personal Debt Service				

CORPORATION TAX RETURN SUMMARY

	Prior Yr. 3	Prior Yr. 2	Prior Yr. 1	Current YTD P & L
Gross Receipts				
Less Cost of goods sold				
Gross Profit				
Compensation to officers				
Salaries & Wages				
Repairs & Maintenance				
Bad Debts				
Rents				
Taxes & License				
Interest				
Depreciation				
Advertising				
Pension				
Employee benefits				
Other deductions				
Total deductions				
Ordinary Income				
Other _____				
Other _____				
Other _____				
Other _____				
Other _____				

PERSONAL HOUSING EXPENSE / FINANCIAL STATEMENT SUMMARY

Residential Mortgage (P & I) / Rent	\$	Total Liquid Assets	\$
Residential Property Taxes	\$	Total Stocks & Bonds	\$
Residential Property Insurance	\$	Total Real Estate Assets	\$
Bank Lines / Notes	\$	Total Business Assets	\$
Auto Loan / Lease Payments	\$	Total Other Assets	\$
Credit Card Payments	\$	Total Liabilities	\$
Other Debt Service	\$	Total Net Worth	\$
Total Personal Debt Service	\$	CREDIT SCORE (FICO)	

PLEASE ATTACH 1003 LOAN APPLICATION FOR BORROWING ENTITY AND ALL INDIVIDUALS