



# NEW LOAN REQUEST SUBMISSION FORM

OWNER OCCUPIED (RETAIL, OFFICE, INDUSTRIAL, SPECIAL USE)

Date:	Contact:
-------	----------

Submitting Broker:			
Phone:		Fax:	
Address:		Cell:	
City:	State:	Zip:	e-mail:

### Transaction/Pricing Details

Principle Borrower:		Telephone:	
Property Address:		Fax:	
City:		Amortization / Term /	
State:	Zip:	E-mail:	

### Property Information

Property Type:			
Property Name:			# of Units:
Property Address:			# of Buildings:
City:	State:	Zip:	County: # of Stories:
Year Built:	Year Last Renovated:		Total Square Ft.:
Rentable Sq. Ft.	Occupied Sq. Ft.:		Vacant Square Ft.:
Site Size:		Number of Parking Spaces:	
Is the Property: <input type="checkbox"/> Multi-use      OR <input type="checkbox"/> Single-use (special purpose)			
Yearly Gross Income:		Yearly Expenses: <small>No mortgage payments, owners draws, or depreciation to be included.</small>	
Yearly Net Income: <small>Before mortgage payments are made.</small>		<i>If refinance:</i> <i>Existing Mortgage Payment:</i> <i>Interest rate:</i> <i>Loan Due Date:</i>	
<b><i>Any other issues or concerns about the property?:</i></b>			

Needs List:

- 1) Owner Occupied Submission Form
- 2) Last 3 years business tax returns
- 3) Last three years personal tax returns for borrower(s)
- 4) Current personal financial Statement for borrower(s)
- 5) Year-to-date current business financials (P&L and balance sheet)
- 6) Digital Color Photos of the Property - (Minimum of 5 photos, front, side, rear, interior and common areas)
- 7) Commercial Application Questionnaire
- 8) For Start up Businesses please provide a CPA prepared operating pro-forma
- 9) Copy of Purchase Contract (if applicable)
- 10) A check to The Achtermann Commercial Lending Group LLC for \$250.00 application fee

*Additional documentation and information will be requested as needed.*

**Contact information:**

The Achtermann Commercial Lending Group LLC

7671 Silver Springs NW

CAnal Winchester, OH 43110-8840

T - 614.833.1280

F - 614.834.5489

[Marvin@AchtermannLendingGroup.com](mailto:Marvin@AchtermannLendingGroup.com)

[www.AchtermannLendingGroup.com](http://www.AchtermannLendingGroup.com)