



Contact information:

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Commercial Application Questionnaire

Property name _____
Property address _____
Property City _____ County _____ State _____ Zip _____

Concerning the property, tell me:

1. What is the real estate tax bill for last year? _____
2. Assessors Parcel No. (Tax ID#): _____
3. Are there any abated taxes? _____ Are taxes fully assessed at this time? _____
4. If not, what is the expected full assessment? _____
5. What is the property insurance bill for last year? _____
6. What date does the premium expire? _____
7. Are there any regulatory or deed restrictions concerning the property? _____
If yes, please explain: _____
4. What is the current physical occupancy? _____

Concerning the improvements, the site & who lives there:

1. Send me an old appraisal if you have one. We'll send it back if you want us to.
2. If you don't have an old appraisal, tell me:
 - A. Type of property (office, industrial, anchored retail, un-anchored retail, etc.) _____
 - B. When was this property built? _____ C. When was it last renovated? _____
Amount of renovations: \$ _____ Description: _____
 - C. How many units? _____ D. Total Rentable Square Feet: _____ Attach a unit breakdown
and tenant/lease summary including any vacant space showing square footage, rent, type of lease for each.
 - D. What type of construction? _____
 - E. # of parking spaces? _____ F. What is the site size? _____
3. What is the current estimated market value of the property \$ _____

If this is a refinance:

1. What is the existing loan balance? _____ P&I payment? _____
Interest rate? _____ Call or due date? _____
Lender Name? _____
Can this loan be prepaid? _____ What is the prepayment penalty? _____
2. When did you buy the property? _____ What was the purchase price? _____
What was the down payment? _____ Was it a trade or straight purchase? _____

If this is a purchase:

1. What is the purchase price? _____ Forward a copy of the purchase agreement.
2. What physical condition is the property in? _____
Describe any deferred maintenance? _____
Estimated \$ amount: _____
2. What is the dollar amount of any anticipated repairs or improvements you are going to immediately make above your down payment? _____
3. What date does your earnest money go hard? _____
Is there a financing contingency beyond this date? _____
If yes, by what date must you have a commitment? _____
(don't short change me, tell me the drop dead date!) _____
4. What is the closing date? _____
5. Is this an exchange or a straight purchase? _____
6. Why are you buying this property? _____

Concerning the borrower:

1. What is the name of the borrowing entity? _____
2. What is the entity structure?, _____ Formed in what state? _____
3. Is the borrower a single asset entity? _____ If no, can it become one? _____
4. Tell us who owns what percentages of the borrowing entity _____

5. Who is the key principal (who signs the closing papers)? _____
6. What is the key principal's social security #? _____
7. What percentage of the deal, either directly or indirectly does the key principal own? _____
8. Any past credit issues on borrower/key principal we need to be aware of _____

Concerning the Management:

1. What is the name of the management company? _____
2. What is the name of the area manager? _____
3. What is the name of the on-site manager? _____

Concerning the loan you want us to give you:

1. What is the current estimated market value? _____
2. How much is your loan request? _____
3. If this is a refinance, what is the reason for your request? _____

4. What do you think the loan to value will be? _____
5. Tell us what terms you would like: Term: _____ Yrs Amortization: _____ Yrs
Rate: Fixed _____ Fixed for how long? _____ Yrs Variable _____
Rate Requested: _____ % Loan to Value: _____

Identify in order of priority the following:

Maximum Loan Dollars/Loan to Value: _____
Lowest Interest Rate: _____
Lowest Payment: _____
Lowest overall financing cost over life of
loan: _____
Low closing costs/Fees: _____
No Personal Recourse/Guarantee: _____
Long Loan Term: _____
Assumable by future buyers: _____
Ability to prepay loan _____

6. What features do you NOT want in your loan? _____

7. When do you want this loan closed? 30 days 45 days 60 days
90 days For 90 days or more: what date? _____ No urgency

8. Is there a deadline you're under? Please explain: _____
Deadline date: _____

9. How long do you plan to keep this property? _____

What is your exit plan:

Sell Exchange Hold Indefinitely No definite plan

I 0. How do you plan to retire this loan?

Refinance Sell or Exchange/Have it assumed Fully Amortize

Payoff in Lump Sum Not Decided

I 1. What is your most important priority or issue regarding this loan? _____

Contact Information:

What is your name? _____

What is your company name? _____

What is your street address? _____

What is your phone #? _____ What is your fax #? _____

What is your cell #? _____ What is your E-Mail? _____

Please submit the following documents with this application:

1. Current rent roll
2. Last 2 year's year-end and year to date operating statements
3. Operating Budget (if current income and expenses are different than on historical operating statements)
4. Color Photos (digital e-mails preferred)
5. Personal Financial Statement on Key Principles
- 6 Borrower's resume (ownership/management experience)
7. Purchase Agreement (if applicable)

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