**LOAN DOCUMENT REQUEST FORM**

# LENDER INFORMATION (*Add more Lenders on Appendix B)*

Use Exhibit “A” for Multiple Beneficiaries List?  Yes  No

Lender’s Name: Name

Lender’s Address: Street

City State: -- ZIP: ZIP code

Lender’s County: County

Invested Amount $Amount

(*leave blank if there is only one lender*)

Lender is  an Individual  Choose an entity.

*If Lender is a Business Entity or Trust:*

Lender was organized or incorporated in the State of State

Is Lender Licensed?  Yes  No

If applicable, Type of License: License

If applicable, License Number: License number

# BROKER INFORMATION

Broker Name: Name

Broker Address: Street

City State: -- ZIP: ZIP code

Is Broker Licensed?  Yes  No

If applicable, License State: License State

If applicable, License Number: License Number

# BORROWER INFORMATION (*Add more Borrowers on Appendix C)*

Borrower Name: Name

Borrower’s Address: Street

City State: -- ZIP: ZIP code

Borrower is  an individual  Choose an entity.

*If Borrower is a Business Entity or Trust:*

Borrower was organized or incorporated in the State of State

*If Borrower is an Individual:*

Select vesting Choose an item.

# GUARANTOR INFORMATION (*Add more Guarantors on Appendix D)*

Guarantor Name:

Name

Guarantor Address:

Street

City State: -- ZIP: ZIP code

Guarantor is  an individual  Choose an entity.

*If Guarantor is a Business Entity or Trust:*

Guarantor was organized or incorporated in the State of State

# PROPERTY INFORMATION (*Add more Properties on Appendix E)*

Property 1 Address

Street

City State: -- ZIP: ZIP code

If Property 1 is residential, is it owner-occupied?  Yes  No

If the lien will be subordinate, which liens will remain on title?

Liens on title

Property 1 Type: Type

Property 1 Lien Priority: Choose a lien position.

Property 2 Address

Street

City State: -- ZIP: ZIP code

If Property 2 is residential, is it owner-occupied?  Yes  No

If Property 2 is subordinated, which liens remain on title?

Liens on title

Property 2 Type: Type

Property 2 Lien Priority: Choose a lien position.

**LOAN INFORMATION**

Loan Number: Loan Number

**Rates and Term**

Loan Amount

Interest Rate

Default Rate

Loan Term in months

$Amount Interest Rate% Default Rate% Term in months

Is the loan interest-only?  Yes No If No, describe amortization: Amortization Description

Is the interest rate fixed or variable? Variable Fixed Method of Interest Calculation Choose an item.

**Miscellaneous**

Prepayment Penalty?  Yes  No

*If yes:*

Is There a step-down prepayment penalty? Stepdown

If there is no step-down, what is prepayment penalty in months? Penalty in months

Interest Reserve in number of months No of months

ACH?  Yes  No

Loan Servicer Choose servicer

Right to Extend?  Yes  No

*If yes:*

Number of extensions No of extensions

Extension Period (months) No of months

Extension Fee (%) Extension Fee

Construction Reserve Amount $Amount

Will interest only accrue on disbursed amounts from Construction Reserve?  Yes  No

**ESCROW INFORMATION**

Escrow Company Name:

Escrow Company

Escrow Officer Name:

Escrow Officer Name

E-mail

Escrow E-mail

**TITLE INFORMATION**

Title Company Name:

Title Company Name

E Title Officer Name:

Title Officer Name

E-mail

Title Officer Name

**\*\*\*\*\*\*\*\* PLEASE USE APPENDIX A TO IDENTIFY CLOSING FEES AND COSTS**

**ADDITIONAL NOTES**

|  |
| --- |
| Notes |

**PRICING INFORMATION**

**You will pay a redraw fee if there is a change in the information above after the loan documents have been drawn.**

Please refer to Geraci’s Pricing Guide or reach out if you have any questions about fees. Flat fees do not include application disclosures or investor disclosures (Mortgage Loan Disclosure Statement, Good Faith Estimate, Lender Purchaser Disclosure Statement, etc.), closing services, negotiation of documents with borrower, or additional legal advice.

**Next Page is Appendix A**

**APPENDIX A**

**CLOSING FEES AND COSTS**

# FEES PAID TO LENDER

|  |  |  |  |
| --- | --- | --- | --- |
|  | **$ Amount of Fees** | **Description of Fees** | **Delivery**  **(Please select from drop-down menu)** |
| 1 | Fee | Description | Choose an item |
| 2 | Fee | Description | Choose an item |
| 3 | Fee | Description | Choose an item |
| 4 | Fee | Description | Choose an item |

# FEES PAID TO BROKER

|  |  |  |  |
| --- | --- | --- | --- |
|  | **$ Amount of Fees** | **Description of Fees** | **Delivery (Please select from drop-down menu)** |
| 1 | Fee | Description | Choose an item |
| 2 | Fee | Description | Choose an item |
| 3 | Fee | Description | Choose an item |
| 4 | Fee | Description | Choose an item |

**FEES PAID TO OTHERS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **$ Amount of Fees** | **Description of Fees** | **Paid To** | **Delivery (Please select from drop-down menu)** |
| 1 | Fee | Description | Name | Choose an item |
| 2 | Fee | Description | Name | Choose an item |
| 3 | Fee | Description | Name | Choose an item |
| 4 | Fee | Description | Name | Choose an item |
| 5 | Fee | Description | Name | Choose an item |
| 6 | Fee | Description | Name | Choose an item |

**APPENDIX B**

**ADDITIONAL LENDER INFORMATION**

Multiple Lender Beneficiary List? Yes  No

Lender 2 Name: Name

Lender 2 Address:

Address

Lender 2 County: County

Invested Amount $Amount

(*leave blank if there is only one lender*)

Lender 2 is  an Individual  Choose an entity.

*If Lender 2 is a Business Entity or Trust:*

Lender 2 was organized or incorporated in the State of State

Is Lender 2 Licensed?  Yes  No

Type of license: License

License Number: License number

Multiple Lender Beneficiary List? Yes  No

Lender 3 Name: Name

Lender 3 Address:

Address

Lender 3 County: County

Invested Amount $Amount

(*leave blank if there is only one lender*)

Lender 3 is  an Individual  Choose an entity.

*If Lender 3 is a Business Entity or Trust:*

Lender 3 was organized or incorporated in the State of State

Is Lender 3 Licensed? Yes  No

Type of License License

License Number: License number

Multiple Lender Beneficiary List? Yes  No

Lender 4 Name: Name

Lender 4 Address:

Address

Lender 4 County County

Invested Amount $Amount

(*leave blank if there is only one lender*)

Lender 4 is  an Individual  Choose an entity.

*If Lender 4 is a Business Entity or Trust:*

Lender 4 was organized or incorporated in the State of State

Is Lender 4 Licensed? Yes  No

Type of License: License

License Number: License number

Multiple Lender Beneficiary List? Yes  No

Lender 5 Name: Name

Lender 5 Address:

Address

Lender 5 County County

Invested Amount $Amount

(*leave blank if there is only one lender*)

Lender 5 is  an Individual  Choose an item.

*If Lender 5 is a Business Entity or Trust:*

Lender 5 was organized or incorporated in the State of State

Is Lender 5 Licensed? Yes  No

Type of License: License

License Number: License number

**APPENDIX C**

**ADDITIONAL BORROWER INFORMATION**

Borrower 2 Name: Name

Borrower 2 Address: Address

Translator Required? Yes  No

Borrower 2 is  an individual  Choose an entity.

*If Borrower 2 is a Business Entity or Trust:*

Borrower 2 was organized or incorporated in the State of State

*If Borrower 2 is an Individual:*

Select vesting Choose an item.

Borrower 3 Name: Name

Borrower 3 Address: Address

Translator Required? Yes  No

Borrower 3 is  an individual  Choose an entity.

*If Borrower 3 is a Business Entity or Trust:*

Borrower 3 was organized or incorporated in the State of State

*If Borrower 3 is an Individual:*

Select vesting Choose an item.

Borrower 4 Name: Name

Borrower 4 Address: Address

Translator Required? Yes  No

Borrower 4 is  an individual  Choose an entity.

*If Borrower 4 is a Business Entity or Trust:*

Borrower 4 was organized or incorporated in the State of State

*If Borrower 4 is an Individual:*

Select vesting Choose an item.

Borrower 5 Name: Name

Borrower 5 Address: Address

Translator Required? Yes  No

Borrower 5 is  an individual  Choose an entity.

*If Borrower 5 is a Business Entity or Trust:*

Borrower 5 was organized or incorporated in the State of State

*If Borrower 5 is an Individual:*

Select vesting Choose an item.

**APPENDIX D**

**ADDITIONAL GUARANTOR INFORMATION**

Guarantor 2 Name: Name

Guarantor 2’s Address: Street

City State: -- ZIP: ZIP code

Guarantor 2 is  an individual  Choose an entity.

*If Guarantor 2 is a Business Entity or Trust:*

Guarantor 2 was organized or incorporated in the State of State

Guarantor 3 Name: Name

Guarantor 3’s Address: Street

City State: -- ZIP: ZIP code

Guarantor 3 is  an individual  Choose an entity.

*If Guarantor 3 is a Business Entity or Trust:*

Guarantor 3 was organized or incorporated in the State of State

Guarantor 4 Name: Name

Guarantor 4’s Address: Street

City State: -- ZIP: ZIP code

Guarantor 4 is  an individual  Choose an entity.

*If Guarantor 4 is a Business Entity or Trust:*

Guarantor 4 was organized or incorporated in the State of State

**APPENDIX E**

**ADDITIONAL PROPERTY INFORMATION**

Property 3 Address:

Street

City State: -- ZIP: ZIP code

If Property 3 is residential, is it owner-occupied?  Yes  No

If Property 3 is subordinated, which liens remain on title?

Street

Property 3 Type: Choose

Property 3 Lien Priority: Choose a lien position.

Property 4 Address:

Street

City State: -- ZIP: ZIP code

If Property 4 is residential, is it owner-occupied?  Yes  No

If Property 4 is subordinated, which liens remain on title?

Street

Property 4 Type: Choose

Property 4 Lien Priority: Choose a lien position.