



Alliance Financial Solutions

# Application Summary

**\*\*Must be filled out completely (if not applicable put N/A)\*\***

**Project Name:** \_\_\_\_\_

**Capital being sought:** \_\_\_\_\_

**Capital Stack breakdown (% Equity, Debt, Mezz, or PACE):** \_\_\_\_\_

**Borrower Name:** \_\_\_\_\_

**Borrower Email:** \_\_\_\_\_

**Borrower Phone:** \_\_\_\_\_

**Entity Name:** \_\_\_\_\_

**Borrower's Corporate Address:** \_\_\_\_\_

**Borrowers Credit Score:** \_\_\_\_\_

**Borrowers Net Worth:** \_\_\_\_\_

**Borrowers Liquidity:** \_\_\_\_\_

**Borrowers Equity (Cash) into the deal:** \_\_\_\_\_

**Property Type (warehouse, SFR, assisted living, commercial office. Etc.):** \_\_\_\_\_

**Property Address:** \_\_\_\_\_

**Loan Purpose (Purchase / Refi / Refi-cash out):** \_\_\_\_\_

**Total Loan Amount Requested:** \_\_\_\_\_

**Appraisal worth & appraisal date:** \_\_\_\_\_

**Post construction appraisal for property/lots/homes:** \_\_\_\_\_

**Loan Term Desired: (6 months 1,2,3,5 year):** \_\_\_\_\_

**Desired Close Date:** \_\_\_\_\_

**Flag (Corporate brand):** \_\_\_\_\_

# Continued

Square footage: \_\_\_\_\_

Number of Buildings: \_\_\_\_\_

Number of rooms per building: \_\_\_\_\_

Avg price per unit per night: \_\_\_\_\_

Room mix (queen, king, double): \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Original purchase price (if the loan is a Refi): \_\_\_\_\_

Property Purchase Price (If this is a purchase): \_\_\_\_\_

Existing loan on property? If yes, payoff amount: \_\_\_\_\_

Permit Status (Issued/ready to pick up?): \_\_\_\_\_

General Contractor: \_\_\_\_\_

Borrower Experience in the last 18 months: \_\_\_\_\_

Exit Strategy: \_\_\_\_\_

Specific Use of Funds: \_\_\_\_\_

Have you applied for financing elsewhere: \_\_\_\_\_

If so, where and why did you not proceed: \_\_\_\_\_

Please also provide the following documentation:

**\*\*Must be included with all deals\*\***

1. Project Summary or Pitch Deck - (Which includes bios, site address, and stats on why this deal work).
2. If construction: Construction budget-including draw schedule (month by month, month 1, month 2, etc. – in EXCEL).
3. Proforma post property being built – IN EXCEL
4. Copy of current appraisal if one has been done