

Borrower readiness checklist

Get prepared for your next investment property deal.

Use this checklist to organize the information for your consultation or application. Estimates are welcome for an initial conversation.

1 Define your deal

- ☐ **Property:** Address, state, property type, and intended use.
- ☐ **Financing request:** Purchase or refinance, requested loan amount, purchase price or current loan balance, and target closing date.

2 Organize your project numbers

- ☐ **Value and income:** Estimated as-is value, after-repair value, or expected monthly rent, as applicable.
- ☐ **Project plan:** Rehab or construction scope, budget, and timeline, if applicable.
- ☐ **Exit strategy:** Plan to sell, refinance, or hold the property as a rental.

3 Prepare your borrower profile

- ☐ **Contact and entity:** Your contact details, borrowing entity name, entity type, and state of registration, if applicable.
- ☐ **Financial overview:** Estimated credit score, available cash, and investment property experience.

4 Have supporting documents ready

- ☐ **Property documents:** Purchase contract, rehab budget or scope, leases, or payoff statement, as applicable.
- ☐ **Borrower documents:** Entity formation records and recent proof of liquidity, when requested by the lender.

Ready to take the next step?

[Book a 15-minute consultation](#)[Complete the full application](#)

Complimentary consultation via Google Meet. The application gives us a fuller picture of your financing needs.

Preparation guide only. Lender requirements vary; financing is subject to review and approval. Business-purpose investment property financing.