

# Mortgage+Care

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## INVESTMENT PROPOSAL

Date \_\_\_\_\_ Loan # \_\_\_\_\_

Property Address \_\_\_\_\_

Owner Occupied \_\_\_\_\_ Non-Owner Occupied \_\_\_\_\_

Income Property \_\_\_\_\_ Other \_\_\_\_\_

### I. LOAN TERMS/NOTE INFORMATION

Amount of loan: \$ \_\_\_\_\_ Term \_\_\_\_\_

Loan to Value \_\_\_\_\_ % Interest Rate \_\_\_\_\_ %

Type:  1<sup>st</sup>  2<sup>nd</sup>  3<sup>rd</sup>  Interest only

Other  Fully Amortized  Partially Amortized

Monthly Return \$ \_\_\_\_\_

Total interest returned during term: \$ \_\_\_\_\_

Late charges: \$ \_\_\_\_\_ ( \_\_\_\_\_ % of mo. pmt.)

Balance at maturity \$ \_\_\_\_\_

Prepayment Bonus: \_\_\_\_\_

Purpose of this loan: \_\_\_\_\_

We are looking for: **1 Investor with \$ \_\_\_\_\_, or 2 Investors with \$ \_\_\_\_\_, each with an individual or 3 Investors with \$ \_\_\_\_\_, each with an individual undivided interest or 4 Investors with \$ \_\_\_\_\_, each with an individual undivided interest.**

Other Amenities: \_\_\_\_\_

**II. ESCROW INFORMATION:** Escrow No. \_\_\_\_\_ Escrow Officer \_\_\_\_\_

Title Company & Address \_\_\_\_\_

Phone ( ) \_\_\_\_\_ FAX ( ) \_\_\_\_\_

### III. EQUITY ANALYSIS

Property Value: \$ \_\_\_\_\_  Estimated  Appraised Date \_\_\_\_\_

Balance of 1<sup>st</sup> Deed \$ \_\_\_\_\_ at \_\_\_\_\_ % = \$ \_\_\_\_\_ per month  Fixed  Adj.

To Be Paid Off \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Held with: \_\_\_\_\_

Balance of 2<sup>nd</sup> Deed \$ \_\_\_\_\_ at \_\_\_\_\_ % = \$ \_\_\_\_\_ per month  Fixed  Adj.

To Be Paid Off \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Held with: \_\_\_\_\_

Balance of 3<sup>rd</sup> Deed \$ \_\_\_\_\_ at \_\_\_\_\_ % = \$ \_\_\_\_\_ per month  Fixed  Adj.

Gross Equity \$ \_\_\_\_\_ —Your Loan \$ \_\_\_\_\_ = Estimated protective Equity \$ \_\_\_\_\_

### IV. BORROWER(S) INFORMATION

Applicant: \_\_\_\_\_ Firm: \_\_\_\_\_ Position: \_\_\_\_\_

How Long: \_\_\_\_\_ Annual Income \$ \_\_\_\_\_ Other Income: \$ \_\_\_\_\_ Total: \$ \_\_\_\_\_

Co-Borrower: \_\_\_\_\_ Firm: \_\_\_\_\_ Position: \_\_\_\_\_

How Long: \_\_\_\_\_ Annual Income \$ \_\_\_\_\_ Other Income: \$ \_\_\_\_\_ Total: \$ \_\_\_\_\_

**V. PROPERTY INFORMATION** Total Combined Incomes: \$ \_\_\_\_\_

PROPERTY ADDRESS(S)	SQ. FT.	LOT SIZE	BDRM/BATH	APP. VALUE
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Subject Property \_\_\_\_\_ \$ \_\_\_\_\_

### Comparable Sales:

### SALE PRICES

1. \_\_\_\_\_ \$ \_\_\_\_\_

2. \_\_\_\_\_ \$ \_\_\_\_\_

3. \_\_\_\_\_ \$ \_\_\_\_\_

### LOAN SUMMARY ADDITIONAL INFORMATION

1. \$ \_\_\_\_\_ Protective Equity 2. \_\_\_\_\_ % Interest Rate 3. \_\_\_\_\_ Term

4. \_\_\_\_\_ Trust Deed 5. \$ \_\_\_\_\_ Full Term Interest Received 6. \$ \_\_\_\_\_ Prepayment Penalty