

## Deal Submission Package

*Thank you for submitting your deal to Brookview Financial, the Nation's Premier Rehab Lender. Please complete this Deal Submission Package for **each deal** you submit. In order for us to ensure the timely processing of your deal, please submit **ALL** of the following:*

- Detailed Repair Budget\*

\*All plumbing, electrical, framing and roofing needs to be completed by a licensed and insured contractor. You will need to submit proof of license and insurance, prior to funding.

- Fully Executed Sales Contract\*

\*With Buyer's name as your entity name, a valid closing date and signed by all parties.

- Home Inspection\*

\*For your protection, Brookview requires that you obtain a comprehensive home inspection (including color photos and performed by a licensed home inspector) prior to closing. Please do not wait until the last minute. Brookview must review the inspection report to be certain all mechanical and aesthetic items that enhance a quick sale of your property are addressed in your rehab budget.

- Color Photos, including a complete Exterior of the house, all rooms inside the house, all mechanics and a complete street scene.

- Entity Docs (Operating Agreement, Articles of Organization, EIN)

- Last two years signed tax returns, including all schedules (personal and business)

- 3 months of most recent Bank Statements for all Bank Accounts (including IRAs, CDs, 401ks & stocks)

- Current HELOC/LOC statements, if funds are available

- A fully completed 4506-T Tax Form

- Last two years W-2 statements

- 3 most recent pay stubs

*Once completed, please submit this form to your National Account Manager via email or fax to (203) 907-4588.*

**NOTE:** Please send copies instead of original documents. Deals and attachments become the property of Brookview Financial and cannot be returned. We also strongly recommend that you call and speak to your National Account Manager prior to submitting this deal.

Date Submitted

Account Manager

**Borrower Information**

Entity Name

Phone

Borrower Name

Alternate Phone

Co-Borrower Name(s)

Street Address

City, State, Zip:

**Property Information**

Property Street Address

City, State, Zip

How did you find this property?

Purchase Price \$

Rehab Amount \$

After Repaired Value \$

Date Contract Signed

Required Closing Date

Expected Rent \$

Please provide the property's listing/sale history over the past 3 years

Property Type

Foundation Sq. Ft.

**Unit 1** Total # of Rooms  # of Bedrooms  # of Bathrooms  Living Area Sq. Ft.

**Unit 2** Total # of Rooms  # of Bedrooms  # of Bathrooms  Living Area Sq. Ft.

**Unit 3** Total # of Rooms  # of Bedrooms  # of Bathrooms  Living Area Sq. Ft.

**Unit 4** Total # of Rooms  # of Bedrooms  # of Bathrooms  Living Area Sq. Ft.

Water Source\*

*\*If your property has a well, you must order an inspection report immediately, to be delivered no later than 4 days prior to closing.*

Sewer\*

*\*If your property is not on a municipal sewer, you must order an inspection report immediately, to be delivered no later than 4 days prior to closing.*

**Please check any extraordinary condition(s) that exist and provide a brief explanation of each:**

- Structural Damage       Fire Damage       Underground Oil Tank       Building Code Violations
- Weather Damage       Insect Damage       Environmental Hazards
- Water Damage       Condemned       Safety Hazards Present

Explanation

**Property Location/Description**

Is the property located in a high-crime area?

Is the property located in a historical district?

Is the property located in a rural area of less than 10,000 residents?

Are there boarded up properties in the area?

If yes, how close?

Is the property within 1,000 feet of a commercial or industrial property? If yes, please explain.

Is the property located on a busy street?

The neighborhood is primarily comprised of:

and

What percentage of properties in the neighborhood are of a similar style? i.e. colonial, ranch, contemporary, etc.

Please describe any unusual lot characteristics i.e. oversized, newly landscaped, steep, odd shape, no frontyard or backyard

What type of parking is available on your property?

Check all that apply:  Garage  Driveway  Off-Street Parking

How would you rate the school system in the area the property is located in?

What type of parking is typical throughout the rest of the neighborhood?

Check all that apply:  Garage  Driveway  Off-Street Parking

Will you be changing the zoning of this property?

If yes, please explain

Are the floors level?

Are the floors firm?

Is the master bedroom at least 12 x 12?

What are the ceiling heights?

**Home Improvements**

Do you plan on selling? If so, what are the 5 "WOW Factors" you plan on implementing to distinguish your property from others in your market? Remember, quality kitchen and bathroom renovations help sell houses fast!

*Note: Please also complete the attached Detailed Repair Budget.*

1)

2)

3)

4)

5)

**Permits/Contractors**

Based on the proposed scope of work, what permits will be required?

Check all that apply:  Building  Plumbing  Electrical  None  
 Other If Other, please explain

**Building Contractors List**

Please list all known contractors expected to do work on this property and provide a copy of their license and insurance. Please update Brookview with any additions or changes of contractors used during the rehab project.

Company Name	Contact Person	Phone Number	Job Responsibilities
<input style="width: 230px; height: 25px;" type="text"/>	<input style="width: 250px; height: 25px;" type="text"/>	<input style="width: 150px; height: 25px;" type="text"/>	<input style="width: 260px; height: 25px;" type="text"/>
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Have you used any of these contractors before?

Is there any family relationship between you and any of your contractors? If yes, please explain.

List all principals and ownership splits and profit-sharing percentages as well as any profit-sharing agreements with third parties (i.e. contractors, realtors).

**REMINDERS FOR THE BORROWER:**

Provide lockbox combination to Brookview in order to expedite the Rehab Draw Process.

Submit a copy of "Certificate of Occupancy" (COO). If none exists, provide new "COO" upon completion of rehab.

Licensed and Insured contractors should be used for all rehab work done on this property.

**Exit Strategy**

When the property is completed do you plan to sell or refinance?

Do you have a top-selling Realtor lined up to help sell your property?  Realtor's Name  Realtor's Phone #

Has a top-selling Realtor commented on your Repair Budget?

Do you have a lender/mortgage broker you plan on working with?  Broker's name  Broker's Phone#

Are you pre-approved for a loan?

Has there been any change in your financial position, including the purchase and/or sale of real estate, since you were approved with Brookview?  If yes, please explain