

MULTI FAMILY

Buildings that have 50 or more different housing units.

DOCUMENTS NEEDED TO GET STARTED

- Rent Roll
- T-12
- Last 3 years of business tax returns
- Lease agreements
- Purchase and sale agreement
- Refi proof of mortgage statement
- YTD P&L and YTD balance sheet



MIXED-USE RETAIL

Space that has more than one function or use within the same facility.

Examples: *Housing, retail, office, recreational, & more*

DOCUMENTS NEEDED TO GET STARTED

- Rent roll
- T-12
- Last 3 years of business tax returns
- Lease agreements
- Purchase and sale agreement
- Refi proof of mortgage statement
- YTD P&L and YTD balance sheet



OWNER OCCUPIED/ RENT SHOPS

When the business owner rents the property that they run their business out of.

DOCUMENTS NEEDED TO GET STARTED

- Last 3 years of business tax returns
- Last 3 years of personal tax returns
- PFS
- Debt schedule
- Lease agreements
- Purchase and sale agreement
- YTD P&L
- YTD balance sheet