

Investment (RE): Single-Family, Condo, Townhomes

*Involves the purchase,
management, and sale of
real estate for profit.*

DOCUMENTS NEEDED TO GET STARTED

- Property address
- Business taxes
- Insurance premium
- Purchase price
- P&S agreement

MULTI-FAMILY/ MIXED-USE RETAIL

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
- YTD balance sheet

