

Commercial Mortgage Checklist

Client Names (First, Last)		Source:	
Address:			
Home Tel: ()		Work Tel: ()	
Cell: ()			
Best time and number to contact:			
Closing Date:		Application Number:	
Standard Documentation		Income Documentation	
<input type="checkbox"/> Signed Application	<input type="checkbox"/> Structural Report	<input type="checkbox"/> T4s	<input type="checkbox"/> Pay Stubs
<input type="checkbox"/> Photo ID	<input type="checkbox"/> Credit Report(s)	<input type="checkbox"/> Employment Letter	<input type="checkbox"/> NOA
<input type="checkbox"/> Appraisal Request	<input type="checkbox"/> Appraisal	<input type="checkbox"/> Rental Income Proof	<input type="checkbox"/> Tax Return
<input type="checkbox"/> Personal Net Worth Statement(s)		<input type="checkbox"/> Financial Statements	<input type="checkbox"/> Business License
<input type="checkbox"/> Picture and Description of Property		<input type="checkbox"/> Property income/expenses (NOI)	
<input type="checkbox"/> Environmental Report		<input type="checkbox"/> Current Rent Roll with names of all tenants	
<input type="checkbox"/> If corporate borrower, details and financials		<input type="checkbox"/> All commercial leases	
For Condominiums Only			
<input type="checkbox"/> Status Certificate		<input type="checkbox"/> Master Insurance Policy	
For Refinancing / Equity Take-Outs and Switches			
<input type="checkbox"/> Current Mortgage Statement		<input type="checkbox"/> Charge/Mortgage	
<input type="checkbox"/> Bank statements		<input type="checkbox"/> Transfer/Deed	
<input type="checkbox"/> Property Tax Statement		<input type="checkbox"/> Property Insurance Policy	
<input type="checkbox"/> Mortgage Repayment History: _____ Months		<input type="checkbox"/> Other:	
For Purchases Only			
<input type="checkbox"/> Purchase & Sale Agreement		<input type="checkbox"/> Proof and Source of Downpayment	
<input type="checkbox"/> MLS Listing		<input type="checkbox"/> Bank statements	
<input type="checkbox"/> Realtor Contact Information		<input type="checkbox"/> Other:	
Disclosure Documentation			
<input type="checkbox"/> Signed Lender Commitment		<input type="checkbox"/> Mortgage Summary/Amortization	
<input type="checkbox"/> Investor/Lender Disclosure		<input type="checkbox"/> Creditor Insurance Request or Waiver	
<input type="checkbox"/> Signed Borrower Disclosure		<input type="checkbox"/> Other:	