

Montgomery Wilshire Capital (“MWC”) Loan Application

Property Address:

Value or Price: \$		Loan Request Amount: \$	
Purchase Date:		Year Property Built:	
<input type="checkbox"/> Purchase	<input type="checkbox"/> Refinance	<input type="checkbox"/> Cash Out Refi	<input type="checkbox"/> Other
Borrower		Co- Borrower	
Name:		Name:	
Approx. Credit Score:		Approx. Credit Score:	
Home Address:		Address (if different):	
Home City/State/Zip:		City/State/Zip:	
Date of Birth:		Date of Birth:	
Yrs. of School:		Yrs. of School:	
Employer Name:		Employer Name:	
Work Phone #:		Work Phone #:	
Work Address:		Work Address:	
Work City/State:		Work City/State	
Position:		Position:	
Annual Income: \$		Annual Income: \$	
Yrs. at job:		Yrs. at job:	
Yrs. in this line of work:		Yrs. in this line of work:	
Previous Employer:		Previous Employer:	
Other Income Source:		Other Income Source:	
Other Income - Monthly: \$		Other Income – Monthly: \$	

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Checking & Brokerage Accounts	Autos, Boat, Personal
Bank #1:	Type/Year:
Avg. Balance: \$	Value: \$
Bank #2:	Type/Year:
Avg. Balance: \$	Value: \$
Bank / Brokerage:	Type/Year:
Avg. Balance: \$	Value: \$
Bank / Brokerage / IRA:	Art / Gold / Jewelry (type):
Avg. Balance: \$	Value: \$

X	Attached Items (check box next to items attached)
	MWC’s Real Estate Schedule Form – Fill in real estate currently owned – One for each borrower couple
	MWC’s Credit Authorization Form – Filled Out & Signed – One for each borrower couple
	IRS 4506T – Find Online – Filled Out & Signed – One for each borrower couple
	Montgomery Wilshire Capital’s Apartment Rent Roll Form – Filled Out – If Apartment Property
	Capital Improvement Form – Fill out only if capital improvements have been made in last 3 years.
	MWC’s Commercial Rent Roll Form – FILL OUT IF COMMERCIAL PROPERTY
	LAST 2 YEARS FEDERAL TAX RETURNS – PERSONAL
	PROPERTY’S SCHEDULE “E” FROM 1040, LAST 2 YEARS OPERATING STATEMENTS, OR PARTNERSHIP RETURNS FOR THE PROPERTY BEING FINANCED.

FAX LOAN APPLICATION WITH ATTACHED FORMS & DOCUMENTS TO:

East Coast Fax: (617) 595-4422

West Coast Fax: (888) 540-8436

1003 LOAN APPLICATION ADDENDUM

Property Address	
Property Type	
Building Square Feet	
Site Square Feet	
Number of Buildings	
Number of Stories	
Type of Construction	
Elevator	
Number of Parking Spaces	
Year Built	
Zoning	
Management Company Name	
Manager's Telephone Number	

YES NO

1. Are there any "Substandard" notices against the property?
2. Are any of the subject property's real estate taxes, utilities, or other assessments not current?
3. Are there any easements or encroachments affecting the subject property that could negatively impact value?
4. Are there any environmental matters affecting the subject property or adjacent properties?
5. Is the subject in violation of any current City, County or State building ordinances, zoning requirements or fire and earthquake regulations?

C O M M E R C I A L P R O P E R T I E S O N L Y

6. Are any of the leases affecting the subject property, not currently in full force?
7. Does any lease have any offset, credit or claim against the lessor?
8. Does any breach exist on the part of lessor or lessee under the leases?
9. Are there any lease provisions, options, rights or contracts existing with respect to the subject property other than those disclosed on the lease summary, including sub-leases?
10. Does the fixed monthly rent reflected on the lease summary include any operating expense reimbursement or reimbursements for tenant improvements?

If any of the above questions are answered "yes", please explain below or attach a separate explanation.
