



**Nationwide Lending Direct, LLC**  
2131 Hollywood Boulevard, Suite 404  
Hollywood, FL 33020  
(954) 908-7770  
[admin@nationwidelendingdirect.com](mailto:admin@nationwidelendingdirect.com)

## EXECUTIVE SUMMARY

Financing Request: \_\_\_\_\_

Borrower: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip Code: \_\_\_\_\_

Principal(s): \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Broker(s): \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Address of Collateral: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Initials



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## EXECUTIVE SUMMARY

### **If Collateral is already owned:**

Purchase Date: \_\_\_\_\_

Arms Length (Y/N): \_\_\_\_\_

Terms: \_\_\_\_\_

List any changes (i.e. improvements, approvals, zoning, etc): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Existing Debt: \_\_\_\_\_

Owed To: \_\_\_\_\_

When Due: \_\_\_\_\_

In Default (Y/N): \_\_\_\_\_

### **If Collateral is being Purchase:**

Purchase Price: \_\_\_\_\_

Arms Length (Y/N): \_\_\_\_\_

Terms: \_\_\_\_\_

Date Contract was entered into: \_\_\_\_\_

List any changes since contract was signed (i.e. improvements, approvals, zoning, etc): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Borrower Liquidity: \_\_\_\_\_

Borrower Net Worth: \_\_\_\_\_

Previous or Current Financing Requested: \_\_\_\_\_



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## EXECUTIVE SUMMARY

Any Approval Terms: \_\_\_\_\_

If denied, what is the issue: \_\_\_\_\_

What are the terms range acceptable Interest Rate/Points/Term: \_\_\_\_\_

Any appraisals in the last 2 years? If so, by whom?: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Current Appraisal Value: \_\_\_\_\_

Completed Value (if applicable) and over how many months: \_\_\_\_\_

Development/Improvement Plan: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Repayment Plan /Exit Strategy: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

What is the current and future ability to Service Debt: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

What are the Use of Proceeds: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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## EXECUTIVE SUMMARY

### If Income Producing:

|  | Actual | Proforma |
|--|--------|----------|
| Occupancy Rate:                                | _____  | _____    |
| Number of Tenants:                             | _____  | _____    |
| Gross Income:                                  | _____  | _____    |
| Expenses:                                      | _____  | _____    |
| NOI:   | _____  | _____    |
| Square Footage:                                | _____  | _____    |
| Average Rent/Square Feet:                      | _____  | _____    |
| Percentage of Tenants Expiring within 2 years: | _____  | _____    |
| Releasing Plan:                                | _____  | _____    |

### If loan proceeds are being used for improvements:

Planned Improvements: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Cost to Complete: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Time to Complete: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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## EXECUTIVE SUMMARY

### Documents Needed for Fully Documented Income:

#### *If Existing Income Producing Property:*

- Personal Financial Statement
- Current Rent Roll
- Operating Statement for the last 2 years
- Last 2 Years Tax Returns Business and Personal

#### *If Developing:*

- Personal Financial Statement
- Sponsor Resume/Bio
- Pro Forma Projections
- Use of Funds Breakdown