



Tell us about the deal.

Seven short sections. Completing this does not pull your credit and is not a commitment to lend on either side. It gives us enough to tell you honestly whether the deal works and what a realistic structure looks like. Fill it in on screen, save it, and email it back. Rough numbers are fine.

1

Applicant and borrower

Who is signing. This is the person the file is underwritten against.

FULL LEGAL NAME *

DATE OF BIRTH

HOME ADDRESS

CITY

STATE

ZIP

PHONE NUMBER *

EMAIL ADDRESS *

ESTIMATED CREDIT SCORE

MARITAL STATUS

U.S. CITIZEN OR PERMANENT RESIDENT?

☐ No

☐ Yes

We do not collect your Social Security number on this form. A lender will need it eventually, and it is collected then over a secure channel. Do not email an SSN in an unencrypted attachment.

2

Business or borrowing entity

Skip this section if you are borrowing in your own name.

LEGAL BUSINESS OR ENTITY NAME

DBA, IF ANY

ENTITY TYPE

☐ LLC

☐ Corporation

☐ Partnership

☐ Sole Proprietor

☐ None yet

STATE OF FORMATION

EIN OR TAX ID

YEARS IN BUSINESS

BUSINESS ADDRESS

CITY

STATE

ZIP



BUSINESS PHONE

BUSINESS EMAIL

ANNUAL BUSINESS REVENUE

AVERAGE MONTHLY REVENUE

3

Loan request

What you are asking for. Rough numbers are fine at this stage.

LOAN PURPOSE

☐ Purchase

☐ Refinance

☐ Cash-Out

☐ Fix & Flip

☐ Rental or DSCR

☐ Construction

☐ Bridge

☐ Other

REQUESTED LOAN AMOUNT

PURCHASE PRICE OR CURRENT VALUE

DOWN PAYMENT OR EQUITY

ESTIMATED CLOSING DATE

LOAN TERM REQUESTED

INTEREST ONLY REQUESTED?

☐ No

☐ Yes

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Subject property

The property being financed. If none is identified yet, note that in section 7.

PROPERTY ADDRESS

CITY

STATE

ZIP

PROPERTY TYPE

☐ Single Family

☐ 2-4 Unit

☐ Multifamily

☐ Mixed Use

☐ Commercial

☐ Land

☐ Other

OCCUPANCY OR USE

☐ Investment

☐ Owner Occupied

☐ Vacant

NUMBER OF UNITS

CURRENT OR PROJECTED MONTHLY RENT

ANNUAL PROPERTY TAXES

INSURANCE, ANNUAL

HOA OR ASSOCIATION DUES



EXISTING MORTGAGE BALANCE

EXISTING MONTHLY PAYMENT

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Real estate experience

First deal? Put zeros. It changes the terms, not whether we will work with you.

INVESTMENT PROPERTIES CURRENTLY OWNED

BOUGHT OR SOLD IN LAST 3 YEARS

FIX AND FLIP PROJECTS COMPLETED

GROUND UP PROJECTS COMPLETED

CURRENT PORTFOLIO VALUE, ESTIMATE

CURRENT REAL ESTATE DEBT, ESTIMATE

DESCRIBE RELEVANT REAL ESTATE EXPERIENCE

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Financial and credit background

Answer honestly. All of it is findable, and a surprise later kills a deal faster than a yes now.

LIQUID FUNDS FOR CLOSING AND RESERVES

SOURCE OF FUNDS

TAX LIENS?

IF YES, AMOUNT

☐ No ☐ Yes

JUDGMENTS?

IF YES, AMOUNT

☐ No ☐ Yes

BANKRUPTCY IN THE LAST 7 YEARS?

IF YES, YEAR OR DISCHARGE DATE

☐ No ☐ Yes

FORECLOSURE, SHORT SALE, OR DEED IN LIEU?

IF YES, DATE AND DETAILS

☐ No ☐ Yes

DELINQUENT ON ANY MORTGAGE OR LOAN?

IF YES, EXPLAIN

☐ No ☐ Yes



7

Transaction and project details

The part that decides whether a hard money or bridge file actually pencils.

PROPERTY UNDER CONTRACT?

CONTRACT PURCHASE PRICE

☐ No ☐ Yes

ESTIMATED REHAB OR CONSTRUCTION BUDGET

ESTIMATED AFTER REPAIR VALUE (ARV)

EXIT STRATEGY

☐ Sell ☐ Refinance ☐ Hold or Rent ☐ Other

EXPECTED COMPLETION OR STABILIZATION DATE

ADDITIONAL NOTES OR FINANCING NEEDS

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Authorization and certification

Read this. It is short and it is the actual agreement.

I certify that the information provided in this prequalification application is true, accurate, and complete to the best of my knowledge. I authorize Busy B Solutions and applicable financing partners, lenders, assignees, service providers, or representatives to review and verify information provided for the purpose of evaluating potential business or real estate financing options.

I understand this application is for prequalification only and is not a commitment to lend, approval, or guarantee of financing. Additional documentation and verification may be required before any financing decision or offer is made.

Where permitted and necessary for the review, I authorize the obtaining of relevant credit, financial, banking, property, or other reports and records.

☐ I have read the authorization above and certify that everything entered is true and complete.

APPLICANT SIGNATURE *

DATE *

PRINTED NAME

TITLE OR CAPACITY

Return this application to beverly@busybsolutions365.com or call 770-906-7777. You should not pay an application fee to find out whether you qualify. Third party costs such as an appraisal are paid to the appraiser, not to a broker.