



Commercial Intake Worksheet

Broker / Borrower Name: _____ Broker Borrower
Mobile Phn: _____ Work Phn: _____
Email: _____
Address: _____ City: _____ St: _____ Zip: _____

Loan Amount Requested: \$ _____ Borrower Type (Indiv, business, etc): _____
Loan Purpose: _____ Borrower Credit: _____
 Purchase Construction / Perm Refinance

If refi, purpose or use of proceeds: _____ Acquisition Date: _____ Acquisition Cost: _____

Building Type: _____ Value / Purchase Price: _____ Bldg Age: _____
 Generic Use Semi-generic Mixed Use Special Purpose

Owner Occupied Non-Owner Occ # of Tenants: _____

Owner Occ % _____ # of Units _____ If Owner Occupied: Years in Business: _____

Property Location: City: _____ State: _____

Property Status / Condition:

Fully Occupied Vacant Under Const./ Renov.

LTV Requested _____ Down Payment Available (if purch): \$ _____

Notes:

Step 1: Complete Intake Worksheet

Step 2: Email Intake Worksheet to: apps@m5funding.com or call 888.662.5748 x 1

M5 Quote Details:

Rate: _____ Amort: _____ Term: _____ LTV: _____
Points: _____ Turnaround: _____ App Needed for CLA / LOI: _____

M5 Use Only:
Recommended Programs: _____
Next Follow up Steps: _____
App Sent: _____ Date: _____
Add to CRM: _____ Date: _____