

# Evergreen Real Estate Investments LLC - Loan Application

## Section 1: Borrowing Entity

Borrowing Entity Name:

Borrowing Entity Type:  Limited Liability Company       Corporation       Limited Partnership

Borrowing Entity EIN #:

## Section 2: Personal Information

Principal	Additional Principal
Equityholder of Borrowing Entity? <input type="checkbox"/> Yes <input type="checkbox"/> No	Equityholder of Borrowing Entity? <input type="checkbox"/> Yes <input type="checkbox"/> No
Guarantor? <input type="checkbox"/> Yes <input type="checkbox"/> No	Guarantor? <input type="checkbox"/> Yes <input type="checkbox"/> No
First Name:	First Name:
Middle Name:	Middle Name:
Last Name:	Last Name:
Suffix:	Suffix:
Date of Birth:	Date of Birth:
Citizenship Status:	Citizenship Status:
Social Security Number:	Social Security Number:
Credit Score (approx.):	Credit Score (approx.):
Street #:	Street #:
Street name:	Street name:
Apt/unit:	Apt/unit:
City:	City:
State:	State:
Zip Code:	Zip Code:
Home Phone:	Home Phone:
Work Phone:	Work Phone:
Cell Phone:	Cell Phone:
Email Address:	Email Address:
Experience (1 = No Flips, 5 = 20+ Flips): <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5	Experience (1 = No Flips, 5 = 20+ Flips): <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5

### Investment Property Track Record

Property Address	Entity Name	Purchase Date	Purchase Price	Rehab Budget	Sold Date	Sold Price	Exit Strategy	Borrower Name(s)

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Section 3: Collateral Property	
Collateral	Additional Collateral
Property Type:	Property Type:
Property Street #:	Property Street #:
Property Street Address:	Property Street Address:
Property City:	Property City:
Property State:	Property State:
Property Zip:	Property Zip:
Purchase Price:	Purchase Price:
Purchase Date (If Already Owned):	Purchase Date (If Already Owned):
Debt Amount? (If Already Owned):	Debt Amount? (If Already Owned):
\$ of Rehab Complete:	\$ of Rehab Complete:
Total Rehab Budget:	Total Rehab Budget:
As-Is Value:	As-Is Value:
After Repair Value:	After Repair Value:
How is the property sourced? <input type="checkbox"/> Short Sale <input type="checkbox"/> REO <input type="checkbox"/> Foreclosure Auction <input type="checkbox"/> Sheriff's Sale <input type="checkbox"/> Estate Sale <input type="checkbox"/> Online Auction <input type="checkbox"/> Bankruptcy Sale <input type="checkbox"/> MLS <input type="checkbox"/> Private Sale <input type="checkbox"/> Wholesaler If Wholesaler, how much did Wholesaler pay for the property? _____	How is the property sourced? <input type="checkbox"/> Short Sale <input type="checkbox"/> REO <input type="checkbox"/> Foreclosure Auction <input type="checkbox"/> Sheriff's Sale <input type="checkbox"/> Estate Sale <input type="checkbox"/> Online Auction <input type="checkbox"/> Bankruptcy Sale <input type="checkbox"/> MLS <input type="checkbox"/> Private Sale <input type="checkbox"/> Wholesaler If Wholesaler, how much did Wholesaler pay for the property? _____
Please Describe Renovations: <input type="checkbox"/> No Renovation <input type="checkbox"/> Light and cosmetic/Cleanout <input type="checkbox"/> Moderate Rehab <input type="checkbox"/> Heavy/Gut Rehab <input type="checkbox"/> Vertical/Horizontal Enlargement <input type="checkbox"/> New Construction	Please Describe Renovations: <input type="checkbox"/> No Renovation <input type="checkbox"/> Light and cosmetic/Cleanout <input type="checkbox"/> Moderate Rehab <input type="checkbox"/> Heavy/Gut Rehab <input type="checkbox"/> Vertical/Horizontal Enlargement <input type="checkbox"/> New Construction
Exit Strategy? <input type="checkbox"/> Fix and Flip <input type="checkbox"/> Flip <input type="checkbox"/> Refi <input type="checkbox"/> Rent-flip <input type="checkbox"/> Rent-Refi	Exit Strategy? <input type="checkbox"/> Fix and Flip <input type="checkbox"/> Flip <input type="checkbox"/> Refi <input type="checkbox"/> Rent-flip <input type="checkbox"/> Rent-Refi

Section 4: Loan Request	
Loan Request towards Purchase Price? (Initial Advance) <input type="checkbox"/> Yes <input type="checkbox"/> No	Initial Loan/Cost: _____ %
Loan Request towards Rehab Budget? (Construction Holdback) <input type="checkbox"/> Yes <input type="checkbox"/> No	Construction Holdback/Renovation Budget: _____ %
Total Loan Amount:	Renovation Budget/Purchase Price: _____ %
	LTV: _____ %
	ARLTV: _____ %

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Section 5: Personal Financial Statement			
<u>ASSETS</u>	Amount in \$	<u>ASSETS</u>	Amount in \$
Cash – Checking:		Cash – Checking:	
Cash – Savings:		Cash – Savings:	
Securities:		Securities:	
Notes Receivable:		Notes Receivable:	
Life Insurance Cash Surrender Value:		Life Insurance Cash Surrender Value:	
Retirement Funds:		Retirement Funds:	
Real Estate Value:		Real Estate Value:	
Other Assets:		Other Assets:	
Total Assets:	0	Total Assets:	0
<u>LIABILITIES</u>		<u>LIABILITIES</u>	
Current Debt:		Current Debt:	
Notes Payable:		Notes Payable:	
Taxes Payable:		Taxes Payable:	
Real Estate Mortgages:		Real Estate Mortgages:	
Other Liabilities:		Other Liabilities:	
Total Liabilities:	0	Total Liabilities:	0
Net Worth:	0	Net Worth:	0
<u>SOURCES OF INCOME</u>		<u>SOURCES OF INCOME</u>	
Employment Information:		Employment Information:	
Salary:		Salary:	
Bonus & Commissions:		Bonus & Commissions:	
Real Estate Income:		Real Estate Income:	
Other Income:		Other Income:	
Total Income:	0	Total Income:	0

### Credit Report Authorization

Applicant(s) authorizes Evergreen Real Estate Investments LLC to (i) obtain a credit report for the applicant(s) and (ii) charge the credit card below an amount of no more than \$45 in connection with the loan application for the property listed above.

Credit Card Information		
Applicant Name:		
Credit Card:	<input type="checkbox"/> Visa	<input type="checkbox"/> Mastercard <input type="checkbox"/> American Express
Card #:	Expiration:	CVV Code:
Billing Address:		

\_\_\_\_\_  
Applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Applicant

\_\_\_\_\_  
Date

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## Document Checklist

- Completed Loan Application
- Copy of driver's license
- Copy of last 2 years personal tax returns
- Copy of last 2 years business tax returns
- Copy of personal bank statements for last 3 months
- Copy of business bank statements for last 3 months
- Executed purchase and sale agreement
- Borrower entity formation document (e.g., certificate of formation)
- Operating agreement, partnership agreement or bylaws
- Appraisal
- Title company contact information
- Lawyer contact information
- Certificate of insurance coverage (provided prior to closing)