



MORTGAGE FORM FOR COMMERCIAL OR MIXED-USE PROPERTIES

(1. CURRENT RENT ROLL including:

- Regulated units (controlled, stabilized)
- Apartment numbers
- Room/Bathroom Count

2. COMPLETE INCOME/EXPENSE STATEMENT on the property including:

- Annual property taxes
- Insurance
- Water/Sewer
- Fuel, Electricity
- Maintenance/Repairs & Management

3. SUMMARY OF ALL COMMERCIAL LEASES (if any) showing escalations & expirations.

4. COMPLETE, DETAILED PHYSICAL DESCRIPTION INCLUDING SQUARE FOOTAGE.

5. IF ACQUISITION, PROVIDE COPY OF FULLY EXECUTED CONTRACT OF SALE.

6. IF REFI, PRICE ORIGINALLY PAID FOR PROPERTY, date of purchase and summary of current financing.

7. PHOTOS, if available.

8. SITE PLAN OR PROPERTY SURVEY, if available.

9. SUMMARY OF CURRENT FINANCING (refinance only) including:

- Current lender
- Current principal balance
- Current interest rate
- Current monthly payment
- Maturity date
- Prepayment penalty information

10. CURRENT PERSONAL FINANCIAL STATEMENT (where applicable) (If you do not have a recent accountant prepared financial statement, please [click here for a pdf form](#))

11. CURRENT BUSINESS FINANCIAL STATEMENT (where applicable)

12. LAST TWO (2) YEARS' PERSONAL TAX RETURNS (where applicable)

13. LAST TWO (2) YEARS' BUSINESS TAX RETURNS (where applicable)

14. PERMISSION TO RUN CREDIT REPORT(S):