



1

**General Information**

**a. Have you financed Real Estate with BridgeWellCapital before?**

Yes, I am a repeat customer:

What is the name of the BridgeWell Capital representative that helped you?

I don't remember

No      How did you find us?      BridgeWell Capital Representative; Name: \_\_\_\_\_  
Referral      Online      Investor Club      Other: \_\_\_\_\_

**b. First Name:** \_\_\_\_\_ **Last Name:** \_\_\_\_\_

**c. Phone Number:** \_\_\_\_\_ **Email Address:** \_\_\_\_\_

**d. What is the purpose of the commercial loan?**

Purchase Money      Refinance      Other: \_\_\_\_\_

**e. What is your strategy for the commercial property?**

Buy/Sell      Buy/Rent      Refi/Sell      Refi/Rent      Other: \_\_\_\_\_

**f. What is your backup exit strategy?** \_\_\_\_\_

**g. What type of commercial property?**

Office      Warehouse      Industrial      Retail      Restaurant      Building Size: \_\_\_\_\_ Sq. Ft.  
Hospitality      Car Wash      Mixed-Use      Multi-Family      International      Land Size: \_\_\_\_\_ Sq. Ft.  
Land      Apartments/Condos  
Other: \_\_\_\_\_

**h. Have you found an commercial property you want to finance?**

2

**Property Information**

**a. Property Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_

**b. Current Occupancy:** Owner Occupancy: \_\_\_\_\_% Tenant Occupancy: \_\_\_\_\_% Vacancy: \_\_\_\_\_%

**c. Occupancy After Closing:** Owner Occupancy: \_\_\_\_\_% Tenant Occupancy: \_\_\_\_\_% Vacancy: \_\_\_\_\_%

**d. Is it under contract?** No      Yes, Estimated Closing Date: \_\_\_\_\_

**e. How much do you expect for rental?** \$ \_\_\_\_\_/month

**f. Building Structure:** Concrete Tilt-Up      Concrete Block      Wood Frame      Steel      Other: \_\_\_\_\_

**g. # Units:** \_\_\_\_\_ **#Stories:** \_\_\_\_\_ **Year Built:** \_\_\_\_\_ **Year Renovated:** \_\_\_\_\_ **Zoning:** \_\_\_\_\_

**h. Site Sq. Ft:** \_\_\_\_\_ **# of Buildings:** \_\_\_\_\_ **Rentable Sq. Ft:** \_\_\_\_\_

**i. What is the current (or proposed) use?** Legal/Conforming      Legal Nonconforming  
Nonconforming      Other

**j. Zoning Type:** \_\_\_\_\_ **Notes:** \_\_\_\_\_

**k. Contract Purchase Price** \$ \_\_\_\_\_ **Est. Rehab** \$ \_\_\_\_\_ **Source of Down Pmt:** \$ \_\_\_\_\_

**l. After Repaired Value (ARV)** \$ \_\_\_\_\_ **General Condition (10 = perfect)**

**m. Rehab Duration Estimate** \_\_\_\_\_ days

**n. General Description of Rehab:**

- o. Are you working with a Real Estate Professional for this purchase?** Yes  No   
RE Professional Name: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_
- p. Is there a lockbox at the property?** No  Yes, Code #: \_\_\_\_\_
- q. Who needs notification for property access for appraisal?** N/A  
Contact Person: Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**3 Your Company Information**

- a. Company Name:** \_\_\_\_\_ **Type:** \_\_\_\_\_ **State of Organization:** \_\_\_\_\_
- b. Authorized Rep. First Name:** \_\_\_\_\_ **Last Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_
- c. Please list names of all borrowing business entity's general partners, corporate officers, stockholders, trustees, and/or guarantors, etc., along with their title, percentage of ownership, and management activity. Enter all titles, such as President, VP, Treasurer, Stockholder, etc.**

Name	Title	Ownership	Active in Management
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____
_____	_____	_____%	_____

**4 Individual Information (Principle Company Owner, Officer, or Manager)**

- a. Current Residence Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_
- b. How long have you lived at your current address?** \_\_\_\_ years
- c. Do you own or rent your current residence?** Own  Rent   
Own: What is the current Value? \$ \_\_\_\_\_ Mortgage(s) Balance? \$ \_\_\_\_\_
- d. Approx. how far is your current residence from the commercial property being financed?** \_\_\_\_ miles
- e. What is your marital status?** \_\_\_\_\_ Spouse's Name (if applicable): \_\_\_\_\_
- f. Approximate annual combined income for Individual (and spouse, if applicable):**  
Last Year: \$ \_\_\_\_\_ Estimated for current year: \$ \_\_\_\_\_ Approximate Credit Score: \_\_\_\_\_
- g. Employer Name:** \_\_\_\_\_ **Position/Occupation:** \_\_\_\_\_ **Years at Job:** \_\_\_\_\_
- h. Are you a member of a real estate investing club?** No  Yes, Name: \_\_\_\_\_
- i. How many years of real estate investing/rehab experience?** \_\_\_\_ **Properties Completed?** \_\_\_\_
- j. Do you have any projects currently in progress?** No  Yes, How many? \_\_\_\_
- k. Commercial properties currently owned?** \_\_\_\_\_ **Rented?** \_\_\_\_ **Vacant?** \_\_\_\_
- l. Do you have Real Estate related experience?** \_\_\_\_\_ How many years of Experience? \_\_\_\_  
Describe: \_\_\_\_\_
- m. Cash reserves (verifiable):** \$ \_\_\_\_\_ **Sources:** Bank  CD  IRA/401k  Other: \_\_\_\_\_
- n. What is your U.S. residency status?**

## Disclosures & Acknowledgment

1. Funding Request: This document is a request for funding from BridgeWell Capital. This is not a loan application. Lender will require a property inspection and other information from Borrower in order to complete a loan application under which Lender can make a credit decision.
2. Business Purposes Only: Borrower and Authorized Company Representative certify that this loan request is being made for Business Purposes Only and that the proceeds of this loan will not be used for personal, family, or household use by the Individual or Authorized Company Representative before or during the term of the loan, if approved.
3. By acknowledgment below the applicant certifies that the information provided in this questionnaire is true and correct to the best of their knowledge.

**Applicant Acknowledgment:** \_\_\_\_\_ **Title:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Email: [loans@bridgewellcapital.com](mailto:loans@bridgewellcapital.com)

**Phone: 866-500-4500**

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Written questions or comments can be addressed to Manager at the address above.