JFG

Deal Summary Cover Sheet

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One page that goes on top of a loan request. It gives the underwriter the building, the ask and the numbers before the first attachment is opened.

Property

Address	
Units and unit mix e.g. 8 units: 4 one-bedroom, 4 two-bedroom	
Year built / last major renovation	
Building type Walk-up, garden, mixed-use with apartments above	
Utilities Who pays heat, hot water, electric, water and sewer	

Request

Transaction Purchase / rate-and-term refinance / cash-out / bridge takeout	
Purchase price or estimated value	
Loan amount requested	
Loan-to-value	
Structure wanted 30-year fixed / ARM / interest-only	
Target closing date	

Income and coverage

Occupancy today Units leased / total units	
Gross scheduled rent, annual	
Trailing 12-month collected income	
Trailing 12-month operating expenses	
NOI as you calculate it	
NOI with lender adjustments Vacancy factor, management fee and reserves added	
DSCR at the requested loan 5+ units: NOI / annual debt service. 2-4 units: gross rent / PITIA.	

Borrower

Borrowing entity and state of formation	
Guarantor(s)	
Units owned today	
Liquid reserves available after closing	
Estimated credit score	

The story in three sentences

What is the plan for the building?	
What should the underwriter know before reading the file? Vacant units, below-market leases, recent capital work, anything unusual	

Attached

Rent roll (date)	
T-12 (period ending)	
Leases	
Entity documents	
Proof of reserves	
Insurance quote	
Purchase contract or payoff statement	

Keep it to one page. If the summary needs a second page, the extra material belongs in the attachments.

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Financing a 2-4 unit or 5+ unit rental building? Get Multifamily DSCR Terms from Jaken Finance Group: jakenfinancegroup.com/dscr-loan-request/ · (833) 264-7776

General education, not a commitment to lend and not legal or tax advice. Rates, terms and conditions offered only to qualified borrowers and are subject to change at any time without notice. Closing times are in business days and commence upon satisfaction of borrower conditions. All loans are subject to asset-based underwriting. Residential investment products are non-owner-occupied only.