

## APARTMENT BUILDING / MULTIFAMILY / MIXED-USE PROPERTY

The need for items #10-13 will vary according to each situation)

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.  
PHOTOS, if available

5. BUSINESS PLAN REGARDING PROJECT (Include in Business Plan, the Business/Industry, a clear explanation of the role you/your company will play in the industry and SIC Number.)

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

7. IF REFINANCE, PRICE ORIGINALLY PAID FOR PROPERTY, date of purchase and summary of current financing.  
SUMMARY OF CURRENT FINANCING (refinance only) including:

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

8. SITE PLAN OR PROPERTY SURVEY, if available.

9. PROJECTIONS: REVENUE AND EXPENSED FOR 5 YEARS

10. PROFESSIONAL PROPERTY MANAGER'S RESUME and FINANCIAL STATEMENT

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)