



LENDING Advisors

EXPERTS IN MULTIFAMILY & HEALTHCARE FINANCING

Andrew LaSalla II, Principal

The information below is required for the most accurate estimate for both the loan eligibility amount and costs for the loan.

Basic Checklist for HUD 223(a)(7) Loan Sizing

1. Include the audited balance sheets and operating statements for the last 3 years.
2. Include your year-to-date financial statements (do not need to be audited).
3. Include the trailing 12-month operating statements.
4. Include the property's last 6 months rent rolls.
5. Include the property's occupancy history, by quarter, for the last three years.
6. Include the property's most recent completed PCNA, if available.
7. Include the property's latest REAC score and date issued.
8. Include a copy of your most recent mortgage statement and mortgage note.
9. Include a copy of the organizational chart.
10. Include the schedule of real estate owned (REO).

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