

# ***Carpenter & Associates, Inc.***

Scottsdale, Az 85259

480-219-3712

Fax 480-219-3714

www.carpenterleasing.com

## **REAL ESTATE SETUP**

**Please fill out the following information for the property[s] you are planning to use as collateral for a loan and either fax back to me at 480-219-3714 with picture of property, appraisal and title work (if available), Phase I environmental study (if available), and any other information you have that may be pertinent. Thank you.**

Owner of Record: \_\_\_\_\_

Property Description: \_\_\_\_\_

Location: \_\_\_\_\_

Address: \_\_\_\_\_

Amount Needed: \$ \_\_\_\_\_

Use of Funds \_\_\_\_\_

Lot Area: \_\_\_\_\_

# Floors: \_\_\_\_\_ Square Footage Per Floor: \_\_\_\_\_

Total Building Area (Sq. Ft.): \_\_\_\_\_

Date Purchased: \_\_\_\_\_ Purchase Amount: \$ \_\_\_\_\_

Current Appraised Value: \$ \_\_\_\_\_

Original Mortgage: Date \_\_\_\_\_ Amount: \$ \_\_\_\_\_

Outstanding Mortgage Amount[s]: \$ \_\_\_\_\_

Gross Income (if applicable): \$ \_\_\_\_\_

Insurance: \$ \_\_\_\_\_ Utilities: \$ \_\_\_\_\_

Real Estate Taxes: \$ \_\_\_\_\_

Misc: \$ \_\_\_\_\_

Net Income (if applicable): \$ \_\_\_\_\_





(Bonds)	(Including maturity on bonds)	In Name of	Pledged?	Market Value

**Schedule B – Real Estate**

Address & Type of Property	Title in Name Of	% of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

**Schedule C – Life Insurance**

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

**Schedule D – Deposit Accounts and Credit with Financial Institutions**  
(Bankers, Savings & Loan Associations, and Credit Unions)

Name & Address of Institution	Account or Credit in Name of	Account Cash Bal.	Original Loan Amt.	Secured or Unsecured	Original Date	Maturity Date	Current Loan Bal.

*(Use Additional Schedules if Necessary)*

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you for the undersigned, or persons, firms, or corporations on whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. I (we) understand that you are relying on this information (including the designation made as to ownership of property) in deciding to grant or continue credit. I (we) represent and warrant that the information provided is true and complete. You may consider this statement to be true and correct until I (we) notify you in writing of a change. You are authorized to make all inquiries you consider necessary to verify the accuracy of these statements and to determine my (our) credit worthiness. You are authorized to answer questions about your credit experience with me.

\_\_\_\_\_  
Signature (Individual)

Date signed \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Signature (Other Party)