



# ARCHWOOD REAL ESTATE

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## LIST OF ITEMS REQUIRED TO UNDERWRITE AN OFFICE OR RETAIL OR WAREHOUSE / INDUSTRIAL PROPERTY

(The need for items #9-12 will vary according to each situation.)

1. **Current Rent Roll**, including:
  - Square Footage
  - Lease Abstract Details (escalations, commencement & expirations, tenant description, etc.)
2. **Complete Income/Expense Statement**, on the property including:
  - Annual Property Taxes
  - Insurance
  - Water & Sewer
  - Electricity & Fuel
  - Maintenance & Repairs
  - Management
  - CAM
  - Leasing commissions
  - Tenant Improvements
3. **Complete, Detailed Physical Description**
4. **If Acquisition, Provide Copy of Fully Executed Contract of Sale**
5. **If Refinance, Price Originally Paid for Property**, date of purchase and summary of current financing
6. **Photos**, if available
7. **Site Plan or Property Survey**, if available
8. **Summary of Current Financing (refinance only)**, including:
  - Current Lender
  - Current Principal Balance
  - Current Interest Rate
  - Current Monthly Payment
  - Maturity Date
  - Prepayment Penalty Information
9. **Information on Management Company**, if separate from ownership
10. **Current Personal Financial Statement**, where applicable
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
14. **Permission to Run Credit Report(s)**, for each partner with an interest of 10% or more. Go to *Forms* and then *Credit Report Authorization* at [www.archwoodre.com](http://www.archwoodre.com) and print the PDF file. (Please make copies for each individual in the case of a corporation or partnership.)