

Portfolio Investment Group, Inc. Private Money Lending Submission Form

Borrower (Principal):

Name:	<input style="width: 100%;" type="text"/>
Address:	<input style="width: 100%; height: 40px;" type="text"/>
City, State, Zip:	<input style="width: 100%;" type="text"/>
Business name:	<input style="width: 100%;" type="text"/>
Years in business:	<input style="width: 100%;" type="text"/>
Primary phone number:	<input style="width: 100%;" type="text"/>
Secondary phone number:	<input style="width: 100%;" type="text"/>
Fax:	<input style="width: 100%;" type="text"/>
Email:	<input style="width: 100%;" type="text"/>

- Property Description:**
- single family
 - 1-4 units
 - condo
 - new construction
 - land

Property address:

- Type of loan:**
- purchase
 - land loan
 - construction
 - refinance
 - cash out refinance
 - second
 - acquisition and development
 - bridge
 - other

if bridge or other, describe the loan you are bridging to or the type of loan:

Purchase price:	<input style="width: 100%;" type="text"/>
Appraised value:	<input style="width: 100%;" type="text"/>
Loan amount requested:	<input style="width: 100%;" type="text"/>
LTV / CLTV:	<input style="width: 100%;" type="text"/>

- Preferred Payback Period:**
- quickest financing
 - lowest rate
 - longest term
 - shortest term
 - bridge (12 to 36 months)

Special Terms Preferences:

(State any special preferences, such as terms in number of years, interest-only, balloon payments, etc.)

Collateral:

(What is available besides the property itself? Specify type of collateral and amount of equity. Real estate equity and liquid cash are best. Equity is value less amount owed.)

For purchases:

Purchase price:	<input type="text"/>
Down payment:	<input type="text"/>
Seller carry:	<input type="text"/>
Seller concessions:	<input type="text"/>
Contract expiration date:	<input type="text"/>

For refinance / cash out requests:

Purchase date:	<input type="text"/>
Original purchase price:	<input type="text"/>
Down payment:	<input type="text"/>
Existing liens:	<input type="text"/>
Improvements made and cost:	<input type="text"/>
Payoff:	<input type="text"/>

For construction or development requests:

Lot equity:	<input type="text"/>
Cost of the lot:	<input type="text"/>
Cost of construction:	<input type="text"/>
Finished value:	<input type="text"/>
Estimated design & development completion:	<input type="text"/>
Developer background:	<input type="text"/>
Credit score:	<input type="text"/>
Current mortgage payments:	<input type="text"/>

Names of guarantors:	
Documentation available:	
Other information, critical dates or special circumstances:	
Loan purpose details and plan to exit or refinance:	

Portfolio Investment Group, Inc.

Disclosure to all prospective borrowers:

Portfolio Investment Group Inc. actively seeks qualified loan scenarios for funding. To provide the best possible service Portfolio Investment Group requires loan packages that are completed with very basic items. All packages must have completed the following basic requirements.

1. Complete and sign the submission for consideration form.
2. 1003 and consent for credit. Out side credit report acceptable for submission (no more than 30 days old)
3. Corporate entity to provide valid proof of designated signer
4. Current appraisal or out dated appraisal for consideration
5. Borrower to provide valid deposit for initial loan processing.

Notes on deposits (including non-California property)

All deposits are non refundable. All deposits are due with initial submission. All loan submissions up to \$1,500,000. require a \$3,000.00 deposit. All loan requests over \$1,500,000. up to \$5,000,000.00 require a \$5,000.00 deposit. All loan requests in excess of \$5,000,000.00 require a \$7,500.00 deposit. All loan Requests in excess of \$10,000,000.00 require a \$10,000.00 deposit.

All appraisal fees are separate and due with Letter of Interest at time of issuance by Portfolio Investment Group Inc. MAI Appraisals not ordered by Portfolio Investment Group are considered but our Investors reserve the right to require a new third party independent appraisal or review at borrowers cost.

Due to the volume of private money loan requests and market conditions all submissions will not be considered or processed without a valid deposit.

_____ Date _____
Agreed/ borrower/broker

We provide private money for residential and commercial loans to borrowers who can provide documentation as to value, equity and history with clear defined exit strategy. We are submitting for your review the above referenced scenario. We look forward to answering any questions you may have on this file. We look forward to your response to this file,

Fill out this form and fax to 949-249-8973 or mail to:

**Portfolio Financial Group
931 S. Coast Hwy.
Laguna Beach, CA 92651**