

Paul E Stansen, APC – DIRECT 818-512-1715

Independent Broker ▪ 30+ Years Real Estate Expertise ▪ Attorney

<https://stansen.com/commercial/>

LOOKING FOR AN ACQUISITION LOAN? IS YOUR LOAN RESETTING OR MATURING? TIME TO REFINANCE?

Let's explore your best options!
I am here to help you make informed decisions.
Mine is comprehensive representation drawing on 30+ years expertise.

Active in the marketplace, I know what prospective lenders are looking for. I work with pace and precision to help you secure the right commercial investment loan for property acquisition or refinance.

CONFIDENTIALLY UPLOAD DOCS – EASY AS 1-2-3

HERE: <https://stansen.com/contact/>
Encrypted Private Secure Server

1

Provide Financials

To help me understand the fundamentals of your financial situation and business ► please upload:

- Promissory Note/s – for ALL LOANS (regardless of whether subject to reset or maturity).
- Mortgage Statement/s – Most recent for ALL LOANS w/Lender contact info.
- 2019+2022+2023 – FEDERAL Tax Returns, all schedules, for owner Business Entity + 2024 when filed.
- FYE 2019+2022+2023 + YTD 2024 – Profit & Loss Statements & Balance Sheets.
- Liquidity Statement demonstrating 10% of loan request + supporting 12-months bank statements.

2

Assess & Analyze

At NO initial cost to you, I will confidentially review your information / documentation resulting in my summary findings, thoughts, & strategies. If everything looks good to proceed, I will present you with an agreement that engages me, as your Attorney and Broker, to exclusively represent your financing needs.

Then, we will gather additional needed documentation see below to create a presentation to several lender prospects to solicit / negotiate the best possible competitive rates and terms ("Term Sheet").

3

20%+ Owner + Property Data

Please tell me more about all property owners whose ownership interest equals or exceeds 20%+ ►

- "PFS" – Personal Financial Statement – (consider using PFS SBA Form 413).
- Schedule of Liabilities SBA Form 2202 – Notes, Mortgages, Accounts Payable.
- Schedule of Real Estate Owned (list all properties).
- Professional Resume - Tell the Lender about your property & why you are a desirable borrower.
- Global Table of Mortgages with interest rates, monthly payments, loan maturities.
- Commercial Real Estate Loan APPLICATION.
- Any recent APPRAISAL (dated within last 4-7 years).

*HOTEL OWNERS – please upload:

- STR REPORT (most recent, if not an independent).
- ADR Report (Average Daily Rate per Room).
- Occupancy Report.
- Franchise Agreement (if applicable).
- Construction Bid Estimate if Renovations are to be paid from loan proceeds.

OUR AIM IS TO HELP YOU MAKE INFORMED DECISIONS!

If your property is currently listed for sale this is not intended as a solicitation. We do not solicit the offerings of other brokers.

Mailing Address: 26500 Agoura Road # 545, Calabasas, California 91302

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