



## Real Estate Intake Form

Complete the form below to get started with your real estate financing.

### PROPERTY - CLASSIFICATION

Transaction Type

Property Category

Property Type

Property Usage

### PROPERTY - TRANSACTION DETAILS

Property Address

Mortgage Balance

Monthly Payment

Annual Taxes

Annual Insurance

Estimated Value

Original Purchase Price

Has Second Mortgage

Cash Out Amount

Title Holder

Date Purchased

Includes Escrow

## PRIMARY BORROWER

First Name

Last Name

SSN

Date of Birth

Credit Score

Rent or Own

Select

Home Address

City

State / Zip

Marital Status

Email

Cell Phone

Business Income

Personal Income

Liquid Assets

## ADDITIONAL INFO / NOTES (OPTIONAL)

Provide any additional context about your situation, timeline, or anything else you would like our team to know.

## MORTGAGE STATEMENT (OPTIONAL)

Attaching your most recent mortgage statement helps speed up review. To attach it, use the paperclip (Attach a File) in your PDF viewer, or send it with this form by email. Check the box below once it is attached.

☐ Mortgage statement attached

**Transaction Type Disclosure.** iDeal Capital Solutions primarily works with non-owner-occupant transactions. Transactions involving an owner-occupant property, including a primary residence, will be handled by our partner lender for regulatory purposes. This disclosure is informational only. It is not a commitment to lend, a loan offer, or an approval.

☐

I certify that all information provided in this application is true and accurate to the best of my knowledge. I authorize iDeal Capital Solutions, its authorized agents, and its partner lenders to verify the information provided. By checking this box, I authorize iDeal Capital Solutions, its authorized agents, and its partner lenders to obtain my credit report for the purpose of evaluating my loan application. I understand this authorization allows for a soft credit inquiry only, which will not impact my credit score. If I receive an approval and elect to proceed, I understand a hard credit inquiry may be required later with my authorization.

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Client Signature

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Date