



## Collateral Information Questionnaire

Date completed:

Property Address:	City:	State:	Zip Code:
Prepared by:	Preparer's Relationship to Transaction:		
Prepared for and on behalf of:	as Lead Applicant.		

The purpose of this questionnaire is to provide additional factual information regarding physical attributes, occupancy agreements and operational characteristics of the property for use in the appraisal and underwriting processes. The primary elements supported with the profile include:

**Please answer each question explaining any "Yes" answers below:**

Yes No

- 1. Is the Property mixed use? If Yes, property does not qualify for loan program.
- 2. Does the property show evidence of having been converted from its initial intended and permitted use – such as from or from a motel?
- 3. Was the property a failed "For Sale" development that is now operated as rental property?
- 4. Does the property have building components built before 1978? (May have lead in paint)
- 5. Does the property have building structures more than 50 years old?
- 6. Check Yes if parking does not conform to current zoning requirements.
- 7. Does the property contain studio or efficiency units totaling more than 25% of the total number of units?
- 8. Is the property subject to rent control restrictions either by public law or under any other agreement?
- 9. Does the property have subsidized rental occupancy?
- 10. Does the property have tenancy restrictions or conditions attached to the property based upon zoning, permit, HUD, municipality or other enablement agreements that set aside tenancy allocations?
- 11. Does the project have a residential component occupancy that should be classified within a "social service market strata", which typically includes uses such as assisted living retirement homes, "halfway houses", nursing homes, or congregate care facilities?"
- 12. Does the property have rooming house tenancy (i.e. – where initial lease occupancy terms are less than six months and/or rent paid more frequently than monthly)?
- 13. Does the property have transient occupancy (High turnover – 50% or more of the units annually re-renting to new tenants)?
- 14. Does the property have single room occupancy (Tenant occupying a single room without a kitchen)?
- 15. Does the property operate as housing for college students by design or operating plan?
- 16. Has the property in the past 12 months offered: 1) rent concessions, or 2) other rent abatement techniques?
- 17. Does the property operate with a "No Security Deposit" policy in place or waive security deposit requirements for more than occasional situations?
- 18. Is the property master metered whereby the electricity and/or gas is paid by the landlord?
- 19. Has the borrower been made aware of any prior testing of the property for any of the following: (A) radon; (B) asbestos; (C) lead hazards; (D) chemical contamination of the soil or ground water; (E) underground subsidence risk; or (F) performance of a Phase 1 Environmental Study?

Question #	Explanation for "Yes" answers:

Who will manage the property?

Company:	Main Contact:		
Address:	City:	State:	Zip:
Phone Number:	Email:		

What are the property manager's qualifications? (Include number of buildings and units under management and how long in the business)

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Other local properties managed:

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

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

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

What short term repairs or replacements of major systems or structural items are planned and what are their estimated costs?

Item:	Cost: \$
Item:	Cost: \$
Item:	Cost: \$
Item:	Cost: \$
Item:	Cost: \$
Item:	Cost: \$
Item:	Cost: \$
Item:	Cost: \$

Lead Applicant Name:	(Signature):	Date:
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