Blue Fox Capital Corporation
DRE 01527288 | NMLS 1840487
(310) 756-3619 | dan@bluefoxcapital.com

Loan Package Checklists

Start with the deal summary. Blue Fox will confirm the documents needed.

DSCR rental loans

These are preparation guides, not a universal lender requirement. Send what is available; identify missing items and expected delivery dates. Do not delay a first conversation while gathering a complete package.

Start here - preliminary review

- [ ] Property address, requested loan amount and purchase/refinance purpose
- [ ] Purchase price or estimated value, current debt and target closing date
- [ ] Current or expected monthly rent, taxes, insurance and HOA dues

Prepare next - as requested for underwriting

- [ ] Loan Application and requested Credit & Background Authorization
- [ ] Current leases and Rent Roll; short-term rental history if applicable
- [ ] Purchase contract or current mortgage statement, as applicable
- [ ] Evidence of down payment, reserves and source of funds when requested
- [ ] Entity Ownership & Signer Information and entity documents if applicable
- [ ] Business Purpose & Occupancy Declaration; additional lender items as requested

Secure submission

Request a secure upload link by email or phone. Use that link for completed forms, identification, bank statements, tax returns and tenant information. Do not email sensitive documents or full Social Security numbers. Blue Fox will identify any additional lender-specific forms and disclosures.

Missing items / expected delivery dates

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Loan Package Checklists

Program-specific preparation guide

Bridge and fix-and-flip

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Start here - preliminary review

- [ ] Property address, purchase price, current value and loan request
- [ ] Rehab estimate, expected after-repair value and exit strategy
- [ ] Closing deadline, available equity and renovation experience

Prepare next - as requested for underwriting

- [ ] Loan Application and requested Credit & Background Authorization
- [ ] Rehab Budget & Scope of Work, contractor bids and timeline
- [ ] Investor & Developer Experience Schedule
- [ ] Purchase contract or current debt statement; property photos
- [ ] Personal Financial Statement, REO schedule and liquidity evidence when requested
- [ ] Entity documents and Business Purpose & Occupancy Declaration

Secure submission

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Missing items / expected delivery dates

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Loan Package Checklists

Program-specific preparation guide

Ground-up construction

These are preparation guides, not a universal lender requirement. Send what is available; identify missing items and expected delivery dates. Do not delay a first conversation while gathering a complete package.

Start here - preliminary review

- [ ] Site address, land ownership status and land basis
- [ ] Proposed project, total cost, loan request and equity available
- [ ] Entitlement / permit status, construction timeline and exit strategy

Prepare next - as requested for underwriting

- [ ] Loan Application, Construction Project Supplement and credit authorization when requested
- [ ] Detailed budget, plans, specifications, permits and approval status
- [ ] Contractor agreement, license and insurance information when requested
- [ ] Investor & Developer Experience Schedule and REO schedule
- [ ] Personal Financial Statement, liquidity evidence and entity documents
- [ ] Purchase / land documents, title information and third-party reports when requested

Secure submission

Request a secure upload link by email or phone. Use that link for completed forms, identification, bank statements, tax returns and tenant information. Do not email sensitive documents or full Social Security numbers. Blue Fox will identify any additional lender-specific forms and disclosures.

Missing items / expected delivery dates

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Loan Package Checklists

Program-specific preparation guide

Multifamily and commercial

These are preparation guides, not a universal lender requirement. Send what is available; identify missing items and expected delivery dates. Do not delay a first conversation while gathering a complete package.

Start here - preliminary review

- [ ] Property address/type, units or rentable area, loan request and purpose
- [ ] Current occupancy, rent roll and estimated property value
- [ ] Existing debt, target close and borrower background

Prepare next - as requested for underwriting

- [ ] Loan Application and requested Credit & Background Authorization
- [ ] Rent Roll, leases and Property Operating Statement
- [ ] Two completed years of operating results and trailing 12 months when available
- [ ] Personal Financial Statement and Schedule of Real Estate Owned when requested
- [ ] Purchase contract or debt statement, entity ownership and authority documents
- [ ] For owner-user businesses: business financials, debt schedule and tax returns if requested

Secure submission

Request a secure upload link by email or phone. Use that link for completed forms, identification, bank statements, tax returns and tenant information. Do not email sensitive documents or full Social Security numbers. Blue Fox will identify any additional lender-specific forms and disclosures.

Missing items / expected delivery dates