



**LIST OF ITEMS REQUIRED TO UNDERWRITE A  
MORTGAGE FOR SELF STORAGE/MIXED USE**

(The need for items #10-13 will vary according to each situation)

1. CURRENT RENT ROLL including:
  - a. Regulated Units
  - b. Apartment Numbers
  - c. Room/Bathroom Count
2. COMPLETE INCOME/EXPENSE STATEMENT on the property including:
  - a. Annual Property Taxes
  - b. Insurance
  - c. Water/Sewer
  - d. Fuel, Electricity
  - e. Maintenance/Repairs and Management
3. SUMMARY OF ALL COMMERCIAL LEASES (if any) showing escalations and expirations.
4. COMPLETE, DETAILED PHYSICAL DESCRIPTION INCLUDING SQUARE FOOTAGE.
5. IF ACQUISITION, PROVIDE COPY OF FULLY EXECUTED CONTRACT SALE.
6. PHOTOS, North, South, East, West.
7. SITE PLAN or PROPERTY SURVEY, if available.
8. IF REFI, PRICE ORIGINALLY PAID FOR PROPERTY, date of purchase and summary of current financing.
  - a. Current Lender
  - b. Current Principal Balance
  - c. Current Interest Rate
  - d. Maturity Date
  - e. Prepayment Penalty Information
9. CURRENT PERSONAL FINANCIAL STATEMENT (where applicable)
10. CURRENT BUSINESS FINANCIAL STATEMENT (where applicable)
11. LAST TWO (3) YEARS PERSONAL TAX RETURNS (where applicable)
12. LAST TWO (3) YEARS BUSINESS TAX RETURNS (where applicable)
13. ARTICLES OF INCORPORATION OR LLC AGREEMENT (if any)
14. BIO/RESUME OF PRINCIPAL(S)
15. MANAGEMENT CONTRACTS
16. PERMISSION TO RUN CREDIT REPORT(S): make copies for each individual in case of a corporation or partnership.