

# ActionOne - Loan Cover Letter



Please complete basic information on this loan submission

Date \_\_\_\_\_ Loan Amount: \_\_\_\_\_

**Select one:**

- Purchase       Rate & Term Refinance       Cash Out Refinance

Purchase price (if purchase) \_\_\_\_\_

Title & Escrow Contact: Name, Phone & Email  
(If NONE, ActionOne will use Western Title for both)

\_\_\_\_\_

**Property Type:**

- Multifamily/Apartment       Commercial/Office/Mixed Use/ Other

**Property Address:** \_\_\_\_\_

**Guarantor Names:**

(If Corp, LLC, LP or Trust, please list  
all members with 20% or more ownership)

\_\_\_\_\_

Is there a Pre-payment penalty  
on current loan, if Yes - how much?

\_\_\_\_\_

**Vesting:** (How title will be taken)

\_\_\_\_\_

**Purchase:**

Source of down payment  
(Name all accounts for verification to be  
matched with bank statements)

\_\_\_\_\_

Does Borrower want impounds on this loan?

- Taxes & Insurance       Insurance Only       Taxes Only       No Impounds

Broker Name, Company Name  
and Address

\_\_\_\_\_

Is broker currently approved with ActionOne?

- Yes       No

Loan Officer or Account  
Executive:

\_\_\_\_\_

Full loan checklist and supporting files located here:

<https://www.actionone.financial/forms>

Contact your ActionOne Financial Loan officer for questions



www.actionone.financial  
(622) 598-4640