

Monroe & Giordano

MORTGAGE BANKERS

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Self Storage Questionnaire and Checklist

We are pleased that you have contacted us regarding the financing of your project. Please take a few minutes and complete this questionnaire and checklist which will speed the processing of your loan.

Checklist: Please provide the following as soon as possible:

1. **Income & Expense Statement for each of the last 3 years and the current year to date.**
2. **Trailing 12 Month Income & Expense with Monthly Occupancies.**
3. **Current Rent Roll and Rate Sheet.**
4. **Next 12 Month Budget (if Available).**
5. **Location Map.**
6. **Pictures & Brochure.**
7. **Copy of Appraisal (if Available) &/or Market Info & Demographics.**
8. **Borrower and/or Principal Financial Statements**
9. **Borrower and/or Principal Resume**
10. **Management Company Brochure/Resume**
11. **Sales Contract (If Applicable)**

REASON FOR FINANCING/DESIRED GOAL: _____

Acquisition:

Refinance:

Loan Dollars Requested:

PROJECT:

Project Name: _____

Address (include zip code): _____

Age of Project: _____

Gross Square Feet: _____

Rentable Square Feet: _____

Estimated Frontage: _____

Estimated Traffic: _____

Count/Day: _____

Number of Floors: _____

Number of Elevators: _____

Number of Lifts: _____

Number of Buildings: _____

Total # of Units: _____

Total Inside: _____

Total Outside: _____

Total Upstairs: _____

Total Downstairs: _____

Average Unit Sq. Ft.: _____

Lot Size: _____

Current Occupancy: _____ % Physical

_____ % Economic

Last Year Occupancy: _____ % Physical

_____ % Economic

Year Before Last Occ.: _____ % Physical

_____ % Economic

Unit Breakdown: Size, Number, Rate (Please Attach)

What is the overall average rent: _____

Does the facility have space for RV, Boat or other storage: _____

How many: _____

What type of construction was used for the facility: Masonry, Metal, Concrete Tiltup,

Other: _____

List any capital improvements made to the property in the previous 3 years:

Year	Improvement	\$ Amount

What features are on site:

Electronic Gate: _____ Alarmed Units: _____

Climate Control: _____ On Site Manager: _____

Motion Detector: _____ Computerized Bookkeeping: _____

Auto Fire Sprinklers: _____

Do you advertise in a telephone directory: _____ How many: _____

What areas: _____

Do tenants sign leases: _____ Term of lease: _____

When are rents expected to increase next: _____ How much: _____

Are there any rent concessions: _____ If so, please explain: _____

When and how much were the historical rent increases for the last 5 years: _____

Do the rent increases go into effect on the leases anniversary dates or at a specified date:

What is the overall market vacancy: _____

Number of tenants that are 60 days or more delinquent in their lease payments 4 or more times during the last 12 months: _____

Percent of tenants who pay in cash: _____

Is this facility in lease up or expanding: (Please explain) _____

Is the facility in a flood plain: _____

Do you have management company info: _____ Please attach.

Are any concessions being offered _____ If so-What: _____

List all competitors within a 3 and 5 mile radius:

Property Name	Square Footage	# of Units	Average Rent

BORROWER:

Name of Borrowing Entity: _____

Type of Entity: Individual _____ Corporate _____ Partnership _____ LLC _____

Is this a single asset entity: _____ If no, explain: _____

What is the address of the Borrowing Entity: _____

Certification: I hereby certify that the above is true and correct to the best of my knowledge. Monroe & Giordano may be paid for servicing the loan by the lender. I also agree to give Monroe & Giordano, LLC the exclusive right to present this submission to all their lenders, except for the following lenders:

Please sign in the space provided below:

_____ Date: _____