

Name	Phone	Email
Agent		
Client		
Need: ☐ Property (broker) ☐ Financing (lender) ☐ Both ☐ Client agreed to share these details		

WHO, WHAT, WHEN, WHERE, WHY & HOW

Required before you call

WHO Who is the client? Have they done this before? Anyone else involved: investors, partners, a co-borrower?

WHAT What do they want to do: buy, refinance, build, expand or lease?

WHEN When do they need to close? Any contract deadlines?

WHERE Where is it? Have they found a property? Is it under contract? What is the price?

WHY Why now? What are they working towards?

HOW How will they pay for it? How much cash can they put in, and where is it coming from?

IF THEY ARE SERIOUS, ALSO ASK

Notes

Deal type

- | | |
|---|---|
| ☐ Purchase | ☐ Refinance / cash-out |
| ☐ Construction | ☐ Business acquisition |
| ☐ Owner-occupied | ☐ Investment |
| ☐ Lease | |

Business

Years in business ☐ Profitable ☐ 2 yrs returns

Property

Type Units / SF

Current rents / occupancy

Documents on hand

- | | | |
|--|--|------------------------------------|
| ☐ Tax returns | ☐ P&L | ☐ Rent roll |
| ☐ Purchase contract | ☐ Business plan | |

Readiness: ☐ Ready to refer ☐ Refer for advisory ☐ Nurture: not yet

Collect facts only. Do not quote rates, terms or down payments, and do not tell a client they qualify.

LENDING QUESTIONS

Financing • Refinance • Construction • Capital



Ross Osten

Power Lending Capital Group

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PROPERTY QUESTIONS

Listing, leasing, value and OMs go to a commercial broker, not a lender.

Start with your company's commercial agent.

Don't have one?

Ask Ross. We have referrals if you need them.