

Deal Intake Checklist

What to gather before asking a funder to review your transaction.

Core Information

- ☐ Property address
- ☐ Purchase price
- ☐ Funding amount requested
- ☐ Closing date
- ☐ Deal type
- ☐ Buyer and seller names
- ☐ Title company and closer contact

Documents

- ☐ Executed purchase contract
- ☐ Assignment agreement or BC contract if applicable
- ☐ Proof of end-buyer funds if applicable
- ☐ Available title or settlement documents

Exit Strategy

- ☐ I can explain in one or two sentences exactly how the short-term funding gets repaid
- ☐ I know the key dates and deadlines
- ☐ I have a realistic backup exit

Learn. Structure. Fund. Close.

Educational resource only. Not legal, tax, investment, or financial advice.