

COMMERCIAL  
CONSULTING SERVICES



**Capital City Mortgage**  
Funding Your Dreams

## **Commercial Loan Consulting and Financing Fee Agreement**

Capital City Mortgage offers is a niche lender offering Commercial Loan Programs nationwide. Our programs are designed for investors purchasing or refinancing investment property loans for residential 1-4, multi-family, mixed-use and small commercial properties.

The Commercial Loan Consulting process begins with 3 Phrases of Services to assure the success of the initial loan approval.

**The program includes the following:**

### **Phase 1 Personal Services**

- \*Preparation of Personal Financial Statement
- \*Obtain and Review Personal Credit Report
- \*Credit and Income Analysis and Recommendations

### **Phase 2 Business Services**

- \*Validation Preparation or Review of corporate entity documents
- \*Review of 3 Years of Tax Returns and Balance Sheets and P &L
- \*Analysis of Eligibility for Business or Personal Loans/Lines of Credit (680+ min)

### **Phase 3 Financing Services**

- \*Completion of Commercial Application Packages
  - \*Review Income /Asset/Credit Analysis
  - \*Property Evaluation/Analysis
- \*Product Recommendation/Implementation
- \*Submit and Obtain Residential and/or Commercial Financing Options  
Mortgage Pre- Approval Letter/Term Sheet



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This agreement made between \_\_\_\_\_ (the "Borrower") and  
Capital City Mortgage ("the Consultant") with mailing address of 610 Uptown Blvd  
Cedar Hill, Texas 75104.

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

**I. Consultant Fees.** The Borrower hereby agrees to pay the following Consultant fees:

- **Initial Processing Fee.** An initial processing fee of \$\_\_\_\_\_ is due to the Consultant from the Borrower for services performed in accordance with this Agreement. The following services are included:
  - **Phase 1 Personal Services**
  - **Phase 2: Business Services**
  - **Phase 3: Financing Services**

**II. Commercial Financing Success Fee.** The Borrower agrees to pay at **closing and funding** the Consultant a success fee equal to **2%** or minimum transaction fee of \$2500.00 for any loan secured which the Consultant was the procuring cause of the financing for a period of 180 days from the execution this Agreement. (Example)

- **Loan Amount: \$500,000 x 2% = \$10,000.00 Due to Consultant at closing**

**III. Lender Fees.** The Borrower understands that the lender may require a cash deposit prior to issuance and acceptance of a loan commitment. Any such deposits will be collected and retained by the lender, subject to the lender's policies and procedures.

- **Commercial Property Appraisal Fees: \$1950.00-\$3500.00**
- **Commercial Property Due Diligence Fees: \$1500.00-\$3,000.00**
- **Residential Investment Property Appraisal Fees: \$600.00-\$850.00**

**IV. Financing is not guaranteed.** The Borrower understands and agrees that this Agreement is not a guarantee and that the proposed financing may not be successfully completed. If acceptable financing cannot be obtained, the Consultant's obligation shall be limited to advising the Borrower that the Consultant is unable to procure the proposed financing.

**V. Information for Borrower.** The Borrower agrees to provide any requested information and to execute and deliver the appropriate completed forms that may be customarily required to secure financing on the Property.

**VI. Term of this Agreement.** The term of this Agreement shall remain in full force and effect for 90 days from the date of its execution OR until a successful loan is made with "the Lender" OR refusal of its offer. This Agreement may be modified or canceled upon written notice.

This agreement constitutes an entire understanding and cannot be modified unless agreed to in writing and signed by all parties. This agreement is binding on the parties aforementioned, their heirs and assigns and all others succeeding in the interest to any party either directly or indirectly.

Agreed to by:

\_\_\_\_\_ Borrower Date \_\_\_\_\_

\_\_\_\_\_ Borrower Date \_\_\_\_\_

\_\_\_\_\_ Borrower Date \_\_\_\_\_

\_\_\_\_\_ Borrower Date \_\_\_\_\_

Digitally Signed by the Consultant: