

## New Construction Loan Onboarding

Borrower Information	
Borrower Name	
Property Address	
Borrower Phone Number (Home)	
Borrower Phone Number (Cell)	
Borrower Email	

Builder Information	
Builder Name	
Builder Address	
Builder Phone (Office)	
Builder Phone (Cell)	
Builder Email	

### Loan Information

Lender	
Lender Address	
Loan Officer	
Loan Officer - Phone / Email	
Loan Processor	
Loan Processor - Phone / Email	

Loan Amount	\$
Funds to be released at closing	\$
Available funds after closing	\$
Comments or Notes	

### Required Information

Budget & Cost Estimate
Plans from Builder/Homeowner (original PDF version preferred)
Contracts - Building contract, land contract (if applicable)
Quotes & Proposals from any sub-contractors
Permits

## Budget and Cost Estimates

<b>Lender:</b>
<b>Borrower:</b>

<b>Property Address:</b>
<b>Builder:</b>

Site	
Items	Budget Amount
Land / Site Value	
Site Preparation - Blasting	
Site Preparation - Clearing – grub	
Excavation - Septic/Sewer	
Excavation - Fill - Finish grade	
Excavation - Rough Driveway	
Landscape - Loam/Seed	
Landscape – Other	
Driveway Finish (Pavement / Gravel)	
Water – Well Pump or Municipal Hookup	
Sewer – Septic or Municipal Hookup	

Exterior and Framing	
Items	Budget Amount
Foundation – Slabs	
Foundation – Walls	
Foundation – Entry	
Foundation – Coating/Insulation	
Frame – Materials	
Frame – Labor	
Porch / Decks / Entry Steps	
Roofing	
Siding	
Exterior Trim	
Chimney – Fireplace / Other	
Windows & Doors – External	
Garage Doors	
Paint – Exterior	

Interior and Finishes	
Items	Budget Amount
Insulation	
Sheetrock / Plaster	
Cabinets / Vanities	
Flooring – Carpet	
Flooring – Wood	
Flooring – Tile	
Flooring – Other	
Stairs – Basement Access	
Stairs – Main (second/third floor)	
Interior Trim – Trim Mop	
Interior Trim – Doors	
Interior Trim – Special	
Electrical Rough	
Electrical Finish	
Lighting Allowance	
Plumbing – Rough	
Plumbing – Finish	
Plumbing – Fixtures	
Accessories – Bath / Other	
Accessories – Shelving	
Accessories – Door Hardware	
Appliances	
Paint – Interior	

Systems	
Items	Budget Amount
Heat & HVAC – Rough	
Heat & HVAC – Finish	
Alarm System	
Central Vac System	
Sprinkler System	
Other Systems	

Other	
Items	Budget Amount
Other Costs	
Miscellaneous	
Real Estate Fees	
Insurance	
Permits	
Project Management / Developer Fee	
Professional Services (Engineering/Architectural)	
Site Fees (Dumpster / On-Site Toilet)	

Total	
Budget & Cost Estimate Totals	