

CRF Experience Form

Experience Report for Real Estate Finance Position

Form must be completed by all applicants - please use one form per position PER YEAR

PART 1: Information and Portfolio	Part 2: Functions Requires 12 of 18
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For Period from:
(month/year) _____ to (month/year) _____

Name: _____

Your Title: _____

Company Name: _____

Business Address

City/Province/ Postal Code _____

Business Telephone _____ Business Fax Number _____

Email _____

Number of Employees Reporting Directly to You _____

Name of Immediate Supervisor (if applicable) _____

Title of Immediate Supervisor (if applicable) _____

Portfolio:

Property Types	Dollar Value	Number of loans & units or Sq.Ft
1. Detached or attached Houses	\$ _____	_____ Loans _____ Units
2. Apartment Buildings	\$ _____	_____ Loans _____ Units
3. Condominiums	\$ _____	_____ Loans _____ Units
4. Office Buildings	\$ _____	_____ Loans _____ Sq.Ft
5. Commercial/Retail Buildings	\$ _____	_____ Loans _____ Sq.Ft
6. Industrial/Other (Please specify)	\$ _____	_____ Loans _____ Sq.Ft

Check the boxes below for every function you perform in the capacity of a RE financial position

Underwriting / Front Office

- | | | |
|----|-------------------------------------|--|
| 1 | <input type="checkbox"/> | Evaluate local, regional and/or national markets.
Specify L, R and/or N _____ |
| 2 | <input type="checkbox"/> | Develop and maintain new business contacts with real estate agents, other lenders, mortgage brokers, builders, major clients, etc. |
| 3 | <input type="checkbox"/> | Have the authority to approve or reject loan/investment applications on the basis of preliminary assessment. |
| 4 | <input checked="" type="checkbox"/> | Examine plans, specifications operating and financial statements and analyze credit information. |
| 5 | <input checked="" type="checkbox"/> | Determine the lending value of a property and recommend the loan/investment amount within your company's guidelines. |
| 6 | <input type="checkbox"/> | Negotiate loan/investment terms including additional collateral arrangements, letters of credit, personal covenants and collateral on other property. |
| 7 | <input type="checkbox"/> | Assemble all documentation and recommend for approval new applications or renewals. (Include loan amounts, rates, term and amortization periods, conditions, schedule of advances, privileges and hold-backs.) |
| 8 | <input type="checkbox"/> | Sign or determine the form and content of a commitment letter. |
| 9 | <input type="checkbox"/> | Have the responsibility for instructing professional resource people, e.g. solicitors, appraisers and trustees. |
| 10 | <input type="checkbox"/> | Authorize progress advances and or full fundings. |

Administration/Back Office

- | | | |
|----|--------------------------|---|
| 11 | <input type="checkbox"/> | Manage a portfolio of loans to ensure the on-going viability of the collateral security, such as property taxes, building & liability insurance, PPSA registrations, health care licenses/certifications, inspections, collection of financial information. |
| 12 | <input type="checkbox"/> | Negotiate or approve fees or miscellaneous expenses applicable to the loan transaction. |
| 13 | <input type="checkbox"/> | Approve partial discharges, fire insurance settlements or reserve disbursements. |
| 14 | <input type="checkbox"/> | Resolve any administrative or legal problems either directly or through the assistance of specialists or solicitors. |
| 15 | <input type="checkbox"/> | Calculate and/or approve Statements of Balances with respect to assumption, information, discharge, etc. |
| 16 | <input type="checkbox"/> | Calculate and/or approve Prepayment Premium Yield Maintenance calculations. |
| 17 | <input type="checkbox"/> | Manage arrears situations or negotiate loan settlements. |
| 18 | <input type="checkbox"/> | Establish the amount of any loss provisions where there are serious arrears, foreclosure or other legal proceedings underway or contemplated. |

_____ Total Number of Functions Checked

Signature of Applicant, verifying the accuracy of this information

Signature _____ Date _____

Signature of Current Supervisor, verifying the accuracy of this information

Signature _____ Date _____