Loan Broker Evaluation Kit

Criteria	Score (1-10)
Understands Your Vision	
Experience with Similar Projects	
Communication & Responsiveness	
Bank Relationships	
Track Record of Successful Closings	
Negotiation Skills	
Creative Financing Strategy	
Transparency & Ethics	
Total	

Compatibility Checklist	
Do they align with your investment goals and values?	
Do they have access to banks who finance your deal type?	
Do they work with only banks and credit unions or do they also provide options for agency debt, SBA loans, and insurance money loans?	
Have they worked with similar investor profiles before?	
Are they able to walk you through DSCR, LTV, and EBITDA metrics?	
Do they proactively offer multiple loan options from various lenders?	
What is their loan broker fee and do you pay it or does the bank?	
Can they represent you confidently in bank negotiations?	
Do they take initiative on long-term financing strategy?	
Are they offering loans that fit both your short-term and long-term investment goals for this property?	
Do they have a long track record with these lenders with high rate of loans closing with that financial institution?	
Total	

Interview Questions for Commercial Loan Brokers	Reply Tracker
Can you walk me through your process for preparing a loan packet?	
What types of banks and lenders do you typically work with?	
How do you evaluate whether a deal is financeable?	
What's your approach to negotiating terms on behalf of a borrower?	
How do you handle refinancing strategy after stabilization?	
What's your experience with my asset class and market?	
Can you provide examples of recent successful deals you've helped close?	
How do you educate or prepare your clients for lender conversations?	
How do you stay updated on bank policies and rate changes?	