

## Investment Advisory Questionnaire

1. What is your credit score? \_\_\_\_\_
2. When was approximate date you last viewed your credit report? \_\_\_\_\_
3. Do you have Capital Available to make a real estate investment in the next 30 days? \_\_\_\_\_
4. If not 30 days then is 60 or 90 days more viable? \_\_\_\_\_
5. What is the minimum and maximum amount you have available for your real estate venture? \_\_\_\_\_
6. Is there a specific geographic market or sub market that interests you? \_\_\_\_\_  
If Yes, please state: \_\_\_\_\_
7. Are you willing to consider other geographic markets? \_\_\_\_\_
8. What is your expectation for annual return? \_\_\_\_\_
9. What is your desired duration for investment? 6,12, 18, 24 months or more? \_\_\_\_\_
10. Would you describe your desired involvement in the project as passive or involved? \_\_\_\_\_
11. Do you have any mortgage latest (30 days or more), bk, foreclosures or significant judgements against you? \_\_\_\_\_  
If Yes, please state: \_\_\_\_\_
12. Are you willing to utilize or partner with additional debt or equity investors? \_\_\_\_\_

### Primary Point of Contact for Subject Transaction

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_