



Investor Profile

___Married ___Single ___Partners ___Corporation

Initial Investment Amount: _____

Additional amount willing and able to invest in next:

6 months_____12 months_____18 months_____24 months

First year financial goal or expectation from investment: _____

How long do you anticipate holding the investment? _____

Can you afford to lose your financial investment? _____

Under what conditions would you terminate your investment?

How would you rate your investment risk tolerance?

*1= very low risk 2= moderate risk 3=very risky _____

Are you looking for long term or short term investment? _____

What annual rate of return would you accept? _____

Are willing and able to take on personal debt? _____

What type of property are you interested in investing in?:

How many investors do you anticipate having in your group?: _____

What should the minimum ___maximum___investment amount be for group members?

How would you determine that you have met your investment goals?:

Are you currently a property owner? _____ Property Type _____

Will you support a call for cash to meet investment expenses?: _____

What is your major fear in regards to investing? _____

Should your investment be geographically bound? _____

What geographical areas? _____

What is your profession or area of expertise? _____

Additional Comments/Concerns:

Type of real estate to consider

- Low Risk (Ground Lease, Triple Net Leases, Fully Occupied, Class A)
- Moderate Risk (Value Add, Vacancy not less than 50%, In the Path of Growth)
- High Risk (New Development, High Vacancy, C & D Properties)

**Typically the higher the risk the higher the expected return*