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**INVESTOR APPLICATION & PROFILE**

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**INVESTOR INFORMATION:**

Name (full name): \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Social Security Number: \_\_\_ - \_\_\_ - \_\_\_\_\_ DOB: \_\_\_ / \_\_\_ / \_\_\_  
Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name (spouse): \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Social Security Number: \_\_\_ - \_\_\_ - \_\_\_\_\_ DOB: \_\_\_ / \_\_\_ / \_\_\_  
Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**INVESTOR EMPLOYMENT HISTORY:**

Current Employer:  
Name and Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Title: \_\_\_\_\_ Supervisor Phone: \_\_\_\_\_  
Length of Employment: Begin \_\_\_\_\_ Still employed? (check one) \_\_\_ yes \_\_\_ no

Previous Employer(s) if above is less than 2 years.  
Name and Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Title: \_\_\_\_\_ Supervisor Phone: \_\_\_\_\_  
Length of Employment: Begin \_\_\_\_\_ End \_\_\_\_\_

Name and Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Title: \_\_\_\_\_ Supervisor Phone: \_\_\_\_\_  
Length of Employment: Begin \_\_\_\_\_ End \_\_\_\_\_

**ASSETS AND LIABILITIES – INVESTMENT PROPERTIES:**

Address: \_\_\_\_\_  
Type of Property \_\_\_\_\_ Present Value \_\_\_\_\_ Amount of Mortgage \_\_\_\_\_  
Gross Rental Income \_\_\_\_\_ Mortgage Payments \_\_\_\_\_ Insurance and  
Taxes \_\_\_\_\_ Date acquired \_\_\_\_\_

Address: \_\_\_\_\_  
Type of Property \_\_\_\_\_ Present Value \_\_\_\_\_ Amount of Mortgage \_\_\_\_\_  
Gross Rental Income \_\_\_\_\_ Mortgage Payments \_\_\_\_\_ Insurance and  
Taxes \_\_\_\_\_ Date acquired \_\_\_\_\_

Address: \_\_\_\_\_  
Type of Property \_\_\_\_\_ Present Value \_\_\_\_\_ Amount of Mortgage \_\_\_\_\_  
Gross Rental Income \_\_\_\_\_ Mortgage Payments \_\_\_\_\_ Insurance and  
Taxes \_\_\_\_\_ Date acquired \_\_\_\_\_

**INVESTOR INCOME:**

Gross Monthly Employment Income Before Deductions: \$ \_\_\_\_\_  
Over time \$ \_\_\_\_\_  
Bonuses \$ \_\_\_\_\_  
Commissions \$ \_\_\_\_\_  
Dividend/Interest \$ \_\_\_\_\_  
Net Rental Income \$ \_\_\_\_\_  
Other (Alimony, child support etc)

TOTAL GROSS MONTHLY INCOME: \$ \_\_\_\_\_

**INVESTOR CREDIT and FINANCIAL INFORMATION:**

**Bank and Financial Accounts**

Checking:  
Institution Name \_\_\_\_\_ Balance \_\_\_\_\_

Savings:  
Institution Name \_\_\_\_\_ Balance \_\_\_\_\_

Retirement Accounts (IRA, 401k, SEP)  
Institution Name \_\_\_\_\_ Branch \_\_\_\_\_

Stocks, Bonds  
Institution Name \_\_\_\_\_ Balance \_\_\_\_\_

Other (money market, etc)  
Institution Name \_\_\_\_\_ Branch \_\_\_\_\_

**MISCELLANEOUS: (check appropriate answer)**

Are there any outstanding judgments against you? \_\_\_\_\_ yes \_\_\_\_\_ no If yes, explain below

Are you a party to a lawsuit? \_\_\_\_\_ yes \_\_\_\_\_ no If yes, explain below

Have you ever been convicted of a felony? \_\_\_\_\_ yes \_\_\_\_\_ no If yes, explain below.

Have you ever filed for bankruptcy? \_\_\_\_\_ yes \_\_\_\_\_ no If yes, explain below.

Explanation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**INVESTOR PERSONAL REFERENCES:**

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

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Known this reference how long? \_\_\_\_\_

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

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Known this reference how long? \_\_\_\_\_

I hereby certify and affirm that all information provided above is true and correct. I fully understand that I am being considered as an investor for possible real estate transactions, and I have not made any false, misleading or incomplete statement in this application. I hereby authorize verification of all information provided in this application, including financial and credit information, via credit bureaus and/or contact with current and previous employers, and personal references.

\_\_\_\_\_  
APPLICANT

\_\_\_\_\_  
DATE