

What Are Your Primary Investment Objectives?

- | | |
|------------------------|-------------------|
| Increase Income | Retirement |
| Diversification | Preservation |
| Long-Term Growth | Short-Term growth |
| Tax Deferral/Avoidance | Other _____ |

How Much Equity Are You Looking to Place?

- | | |
|--|----------------------------|
| \$100,000 - \$250,000 | \$250,000 - \$500,000 |
| Preferred Client | |
| \$500,000 - \$1,000,000 | |
| Select Client Potential One-Off Properties | |
| \$1,000,000 - \$5,000,000 | \$5,000,000 - \$10,000,000 |
| \$10,000,000+ | |

Preferred Holding Period for Investments?

- | | |
|---------------------|--------------|
| 3 Years of Less | 4 to 5 Years |
| 5 to 6 Years | 7+ Years |
| Staggered Portfolio | |

Real Estate Investment Experience

- | | |
|-----------|--------------|
| Limited | Good |
| Extensive | Professional |

Current Occupation

Where Are You in the Investment Cycle?

- | | |
|---------|-------------|
| Young | Middle-Aged |
| Retired | |

Diversification Preferences

- #### Geographical Allocation
- | | |
|--------------------------|----------------|
| 1-2 Properties | 3-5 Properties |
| Portfolio: 5+ Properties | Preservation |
| No Preference | Other _____ |

- #### Asset Type Preference (if any)
- | | |
|-----------------|---------------------|
| Student Housing | Assisted Living |
| Multifamily | Office |
| NNN Retail | Multi-Tenant Retail |
| Self Storage | Residential REO's |
| Other _____ | |

Please Rank in Order of Importance

- (1-5 with "1" being your greatest concern)*
- | | |
|------------------------|-----------------------------|
| Capital Preservation | Cash-on-Cash Rate of Return |
| Types of Property | Location of Property |
| Appreciation Potential | |

Current Holdings

- | | |
|--------------|-------------|
| Cash | Stocks |
| Mutual Funds | Bonds |
| Annuities | Options |
| Commodities | Real Estate |
| Alternative | Other _____ |

I Am an Accredited Investor

- | | |
|-----|----|
| Yes | No |
|-----|----|

Client Printed Name _____ Phone Number _____

Client Signature _____ Date _____