



PALOMAR Note Buyers

Investor Profile Questionnaire

Name: _____ Phone: _____

Address: _____ City State Zip _____

Email: _____ Date: _____

Best Time to contact you? _____

Existing Job/Career: _____ #ofYears _____

What Have You Invested in Before?

What is your Adjusted Gross Annual Income for the last 2 years? _____

Have you invested in real estate prior to this? Yes No If yes, what types of real estate investments _____

Where is the investment coming from? Credit Card IRA Cash 401k CDs Equity Line

If you are to invest, would you be comfortable tying the investment up for 12 months? Yes No

Are you investing money out of a SD IRA? Yes No If Yes, who is your custodian?

For interest payments, how often would you like the payments made?

Quarterly Semi Annually Annually One Lump Sum With My Investment

What would you say your net worth is (including real estate)? _____

What would you say your net worth is (without real estate)? _____

Are you currently involved in a Bankruptcy or Lawsuit of any kind? Yes No

If Yes, Please Explain _____

What type of real estate education classes have you purchased or attended?
