



## Potential for Relationship Questionnaire

Name \_\_\_\_\_

Address \_\_\_\_\_

City/Town \_\_\_\_\_ Prov \_\_\_\_\_ Postal Code \_\_\_\_\_

Tel : \_\_\_\_\_ Cell : \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Current employment: \_\_\_\_\_

Do you own your home? \_\_\_\_\_ Equity? \$ \_\_\_\_\_

Current Value of RRSPs? \_\_\_\_\_ Happy with Current Return? Yes or No

Please provide responses to the following questions as **openly and freely as you are able**. This will provide the framework for determining how compatible you are with our investing programs, and which of those programs best suits your situation.

1. What are your goals and how do they fit with Real Estate investing?

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\_\_\_\_\_  
\_\_\_\_\_

2. If we were meeting five years from today and you were looking back over those five years, what must have happened both personally and professionally, for you to feel contented today with your progress?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. What first hand real estate related experience do you have already? Have you participated in the market? What aspects of it? And what size of deals have you been involved in?

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4. Do you own any other investments, if so what does your portfolio consist of?

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5. How "hands on" do you wish to be with the investment? What decisions do you want to be a part of?

- a. Purchase decisions \_\_\_
- b. Financing decisions \_\_\_
- c. Property Management decisions \_\_\_

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6. What is your primary focus in investing? Are you seeking to become a sophisticated investor yourself, or do you simply need a good return on your dollars and are happy to let someone else manage the problems?

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7. What returns are you seeking?

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8. How soon do you need to realize those returns?

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9. What, if any are your expectations for monthly cash flow?

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10. What financial resources do you bring to the table? How much money can you invest in a single project and what is your total investment capability? Are you prepared to sign personal guarantees? (This is a prerequisite as lenders do not operate without guarantees)

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11. Are the funds you are using cash or borrowed?

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12. How available are your investment resources? Are they readily available or, if not, how much notice will you require to access funds?

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13. Is there someone in your life who will be participating in your decisions related to investments, and do you expect that person to be named as a beneficiary of the investment?

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14. Are you prepared to take action? Or just wanting information?

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15. Do you know anyone else that may be interested in investing?

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