



MONEY PARTNER PRE-QUALIFICATION QUESTIONNAIRE

First Name:	Last Name:
Company Name if any:	
Address:	
Phone:	Date:
E-mail:	

1. How did you hear about us? _____
2. How much money do you want to invest? _____
3. Is this money currently giving you a return? Circle one (Yes) (No)
What is the current return annually (if known)? _____
Are you happy with this return? Circle one (Yes) (No)
Why or why not? _____
4. What are your goals with investing? Circle one: (safety, any return, high return, low risk,) Other: _____
5. What do you feel like is a fair annual return for your money when secured by real estate? _____
6. Are you interested in unsecured lending to us? _____
7. How long do you want to invest? Circle one: (6 mo, 1 year, 2 years, 5 years, 10 years)
8. Is this your money that you are investing with? Circle one (Yes) (No)
9. Where are these monies coming from? ? Circle one: (checking, savings, IRA, cd, trust) Other: _____
10. Are you ready to start investing with us? Circle one: (Yes) (No)
If so, when? _____
11. Does it take time to move the funds from your account? Circle one: (Yes) (No)
If so, how long? _____
12. If you like working with us do you have additional monies that you would like to invest?
Circle one: (Yes) (No)
13. Is there anything else you would like us to know or would like to discuss? _____

THESE INVESTMENTS INVOLVE A DEGREE OF RISK THAT MAY NOT BE SUITABLE FOR ALL PERSONS. ONLY THOSE INVESTORS WHO HAVE NO NEED FOR LIQUIDITY AND CAN BEAR THE LOSS OF A SIGNIFICANT PORTION (OR ALL) OF THEIR INVESTMENT SHOULD PARTICIPATE IN THE INVESTMENT.

By signing this document I am confirming that I am ready to start investing. I understand that this is not a binding contract and understand that terms still need to be discussed.

Signature

Print

ACCREDITED INVESTOR

In order to qualify as an accredited investor, I must meet, at minimum, either of the following income (Section A) or net worth (Section B) requirements.

PLEASE READ SECTION A & B BELOW AND CHECK THE BOX NEXT TO EACH SECTION ONLY IF YOU MEET THE STATED REQUIREMENTS FOR EACH SECTION.

- Section A. INCOME:** I am a natural person who had individual income in excess of two hundred thousand dollars (\$200,000) in each of the two (2) most recent years or joint income with my spouse in excess of three hundred thousand dollars (\$300,000) in each of those years and have a reasonable expectation of reaching the same income level in the current year; or
- Section B. NET WORTH:** I am a natural person whose individual net worth or joint net worth with my spouse, at the time of the purchase of the units, exceeds one million dollars (\$1,000,000), excluding consideration of equity in my personal residence. Note, however, that as of February 27, 2012, any loans against my personal residence taken out within the sixty (60) days prior to a subscription and any negative equity in my personal residence, (as determined by me), must be considered in my calculation of net worth.

SOPHISTICATED INVESTOR

If I don't qualify as an accredited investor, I understand that I may still qualify as a sophisticated investor by demonstrating my ability to evaluate the risks and merits of the investment opportunity, with the assistance of a financial advisor of my choosing (who will sign the subscription booklet on my behalf), or on my own by virtue of my business, education, investing, or financial experience, as provided in the following sections:

- Section C. BUSINESS, FINANCIAL, & INVESTMENT EXPERIENCE & EXPERTISE:** I am an experienced investor as demonstrated by my following investment, business, and financial background information.

Occupation / Profession: _____

Degrees and Designations: _____

Business / Financial Experience: _____

Number of years of real estate investment experience: _____

Current Real Estate Investments

Property Types: _____

Number of Properties: _____

Value: _____

Prior Real Estate Investments

Property Types: _____

Number of Properties: _____

Value: _____

What is the nature of your
previous personal or business
relationships, if any, with the
principals of investing?

THIS IS NOT AN OFFER TO SELL OR SOLICITATION OF AN OFFER TO PURCHASE AN INVESTMENT OR SECURITY. THIS INFORMATION RELATES TO POSSIBLE REAL ESTATE OPPORTUNITIES FOR QUALIFIED PURCHASERS WHO HAVE ESTABLISHED AN EXISTING SUBSTANTIVE RELATIONSHIP WITH MEMBERS OF THE COMPANY WHO HAVE REQUESTED THIS INFORMATION. INTERESTED PERSONS MAY QUALIFY AS INVESTORS BY VIRTUE OF A PRE-EXISTING RELATIONSHIP AND BY PROOF OF BUSINESS EXPERIENCE, INCOME AND NET WORTH.

I/we hereby certify the above is true and correct.

Signature

Date:

Signature

Date:

***Please email the signed and completed form to Joseph@BoazCapitalGroup.org**