

**Investor Financial Profile**

**GENERAL INFORMATION**

Name \_\_\_\_\_

Company (if Corporate Buyer) \_\_\_\_\_

Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone (Home) \_\_\_\_\_ (Office) \_\_\_\_\_ (Cell) \_\_\_\_\_

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

Fax \_\_\_\_\_

How did you hear about this opportunity? \_\_\_\_\_

What intrigued you about this business? \_\_\_\_\_

**FINANCIAL INFORMATION**

What is your current annual gross income? \_\_\_\_\_

How you ever declared Bankruptcy or defaulted on a financial obligation? \_\_\_\_\_

If Yes, please describe \_\_\_\_\_

**Assets:**

Cash / Checking Account(s) \$ \_\_\_\_\_

Savings Account(s) \$ \_\_\_\_\_

Retirement Account(s) \$ \_\_\_\_\_

Investment Account(s) \$ \_\_\_\_\_

Real Estate – Primary \$ \_\_\_\_\_

Real Estate – Other \$ \_\_\_\_\_

Automobile(s) \$ \_\_\_\_\_

Personal Property \$ \_\_\_\_\_

Business Equity \$ \_\_\_\_\_

Other - \_\_\_\_\_ \$ \_\_\_\_\_

Total Assets \$ \_\_\_\_\_

**Liabilities:**

Credit Card Debt(s) \$ \_\_\_\_\_

Automobile Debt(s) \$ \_\_\_\_\_

Installment Loan(s) \$ \_\_\_\_\_

Mortgage(s) \$ \_\_\_\_\_

Other - \_\_\_\_\_ \$ \_\_\_\_\_

Other - \_\_\_\_\_ \$ \_\_\_\_\_

Total Liabilities \$ \_\_\_\_\_

**Net Worth:**

Assets – Liabilities \$ \_\_\_\_\_