

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	\$ _____
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