

Private Money Lender Application

Thank you for taking the time to fill out this application. As part of my real estate funding process, I believe in creating strong, mutually beneficial relationships with investors. My approach is different from traditional investment structures because I place a higher value on people than profits. I'm not just looking for capital; I'm looking to understand the people behind the investments. Your story, your personality, and your goals matter just as much as the financial details, and that's why this profile goes beyond numbers.

This profile is designed to give me a deeper understanding of what drives you as an investor. The financial information helps ensure we're aligned in terms of expectations, but your story and values help me build a community of investors who will work well together in joint ventures. Whether you're investing \$5,000 or \$500,000, I want every investor to feel included and valued - because every contribution matters.

Please take your time to answer the questions thoroughly and honestly. The more detail you provide, the better I can tailor opportunities to meet your needs and match you with like-minded investors. Don't be afraid to let your personality shine through; I believe the best investments come from people who trust and respect one another, and that's what I hope to foster in our partnerships.

If you'd like, feel free to send a few personal photos with your application! Whether it's a picture of yourself, your favorite vacation spot, your pet, or anything else that shows who you are, it's always nice to connect on a more personal level. It's not required, but it's a fun way to add a bit more of you to the process!

This profile is not just a formality - it's a way for us to get to know each other. So, feel free to share your interests, experiences, and even a little humor! After all, investing is a journey, and it's always more enjoyable when we connect as people first.

Personal Information

Full Name: _____

Age: _____ Current Occupation (if applicable): _____

Number of Dependents: _____ Marital Status: _____

Street Address: _____

Location (City/State/Zip): _____

Phone: _____

Mobile: _____

Email(s): _____

Website(s): _____

Investor Story

What made you interested in private lending or real estate investing in the first place?

Tell us about a memorable experience you've had with money or investing. Maybe something funny or unexpected?

What is your investment style? Do you prefer to stay hands-off or are you more actively involved in decision-making?

Any personal hobbies or interests you'd like to share? What gets you excited outside of investing?

Financial Information

Annual Income (before taxes): _____

Net Worth (approximate): _____

Existing Investments (real estate, stocks, bonds, etc.):

Debt Levels (credit cards, mortgages, student loans, etc.):

Investment Objectives

What are your primary goals for investing? (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Retirement Planning | <input type="checkbox"/> Capital Appreciation |
| <input type="checkbox"/> Education Savings | <input type="checkbox"/> Income Generation |
| <input type="checkbox"/> Other (Please specify): _____ | |

What would you say is your ideal financial outcome for your investments?

Risk Tolerance

On a scale from 1 to 10, how comfortable are you with potential losses on your investments? (1 being low risk tolerance, 10 being high)

1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10

Do you prefer stable, low-risk investments, or are you open to higher-risk, higher-reward opportunities?

Desired Profitability

What kind of returns do you typically expect on your investments? (e.g., 6%, 10%, etc.)

How important is it to you to receive consistent returns, or are you okay with more variable outcomes?

Investment Time Horizon

When do you expect to need access to your invested money?

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> 1-3 Months | <input type="checkbox"/> 1-5 years |
| <input type="checkbox"/> 3-6 Months | <input type="checkbox"/> 5+ years |
| <input type="checkbox"/> 6-12 Months | <input type="checkbox"/> Open to long-term investments |

Investment Experience

How would you describe your knowledge of investing?

- Beginner
- Intermediate
- Advanced

Have you made any investments in real estate before? If so, please briefly describe.

What has been your best (or worst) investment experience so far? Feel free to share any lessons learned.

Liquidity Needs

How easily can you access funds in case of an emergency or unforeseen situation?

Do you prefer investments that allow for easy withdrawal, or are you comfortable with funds being tied up for a while?

Tax Considerations

What tax bracket are you currently in (if known)?

Are there any specific tax considerations or concerns that affect your investment choices?

Bonus Questions

If your investments were a type of animal, what would they be and why?

If you had a superpower that helped you with investing, what would it be?

With an unlimited budget, where would you go on vacation?

Besides investment capital, what skills or abilities come with your investment?