

# Cypress Ventures Group

## Real Estate Questionnaire

### YOUR INFORMATION

Date: \_\_\_\_\_

Investor Name, Title (individual or within Co.)

Name(s) of partner(s), if applicable

If you invest or lend with an entity (LLC etc.),  
state name of company and state of organization  
to the right:

Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

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

Preferred Contact Method: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

SS# or Entity Tax ID: \_\_\_\_\_

Occupation / Business Type: \_\_\_\_\_

Years of experience in business: \_\_\_\_\_ In real estate investing or lending: \_\_\_\_\_

Do you (or your entity) meet any of the qualifications for being an “Accredited Investor?”

You are deemed “accredited” if you meet the following (or one of the other qualifications not listed here for other entity types):

- (i) a natural person whose individual net worth (not including the value of your primary residence), or joint net worth with your spouse, presently exceeds \$1,000,000;
- (ii) a natural person who had an individual income in excess of \$200,000 in each of the two most recent years or joint income with your spouse in excess of \$300,000.00 in each of those years and you reasonably expect reaching the same income level in the current year;
- (iii) a corporation, partnership, trust, limited liability company, or other entity in which all of the equity owners are “accredited investors;”

Yes: \_\_\_\_\_ No: \_\_\_\_\_ Unsure: \_\_\_\_\_

If you are working with an attorney, please fill out their name and contact information:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

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

*Next Page >>>*

# Cypress Ventures Group

---

## Real Estate Questionnaire

Our company needs to learn more details about your investing strategy, goals, and experience including answers to the questions below. Some prefer to discuss these questions verbally, and if that is the case for you, please contact us to set up a meeting or phone call. Thank you for your time and interest in working with us. We truly appreciate it.

Please describe your business and investing background and experience, including types of investments:

---

---

---

---

What are your investment goals? \_\_\_\_\_

---

---

On a scale from 1-10 (Conservative to Aggressive), what is your risk tolerance for real estate investments? \_\_\_\_\_

How much capital have you lent or invested in prior real estate projects (estimate)? \_\_\_\_\_

---

---

What is your current net worth? \_\_\_\_\_

What types of investments do you currently have (real estate, equities, etc.) and the value of those investments?

---

---

How much capital are you considering investing or lending at this time? \_\_\_\_\_

What kind of returns are you getting from your other investments? \_\_\_\_\_

---

---

What experience do you have in Private Placements? \_\_\_\_\_

---

---

What is your investment time horizon? \_\_\_\_\_

What liquidity needs do you have? \_\_\_\_\_

Would you like to hear about future lending or investing real estate opportunities in the future? \_\_\_\_\_

---

---

Other comments or information you would like to share?

---

---

---

*Thank you again!*