



## Initial Customer Profile

Personal Information							
Name				Phone			
Address							
Email				Age			
Family							
Married	Yes	No	# of Children		Ages		
Occupation							
Name of Company							
Title / Responsibility							
Self-Employed?	Yes	No					
Retirement Accounts							
IRA	Yes	No	Balance: \$	Roth IRA	Yes	No	Balance: \$
Sep IRA	Yes	No	Balance: \$	401(k)	Yes	No	Balance: \$
Pensions	Yes	No	Balance: \$	Annuity	Yes	No	Balance: \$
Other	Yes	No	Balance: \$				
Are Any Self-Directed?	Yes	No	Who Is Your Custodian?				
Real Estate Information							
Amount To Invest in Real Estate	\$						
Level of Risk	Aggressive		Moderate		Conservative		
What Real Estate Investments Do You Currently Own?							
What Else Should we Know?							