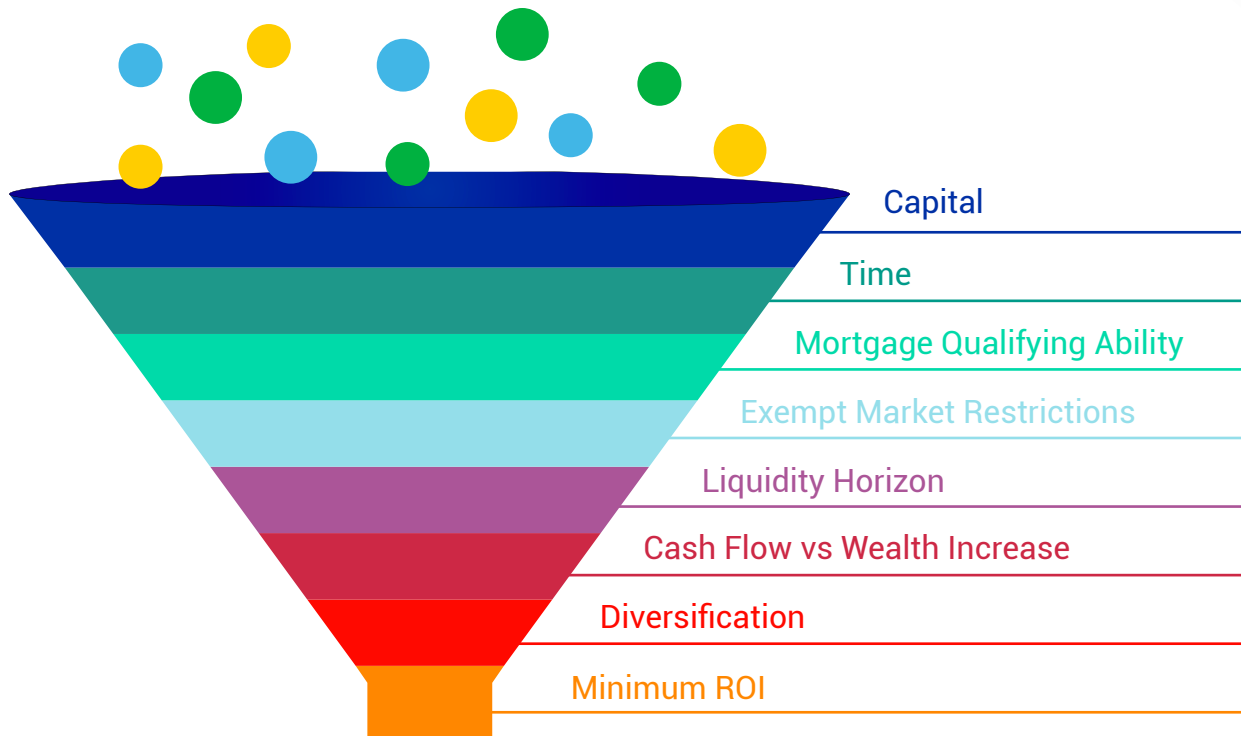


INVESTMENT CRITERIA



Available Capital

- What is the minimum or maximum you want to allocate to a single investment?
- What is the source of the capital (cash, borrowed funds, retirement savings)?
- How quickly can the funds can be accessed?

Available Time

- How much time can you commit to the investment?
- Consider the time required to find the investment, to initiate and close on it, and time to maintain it

Mortgage Qualifying Ability

- Can you qualify for a mortgage/refinance?
- How much do you qualify for?
- Have you talked to a mortgage broker?

Exempt Market Restrictions

- Understand that there's different criteria levels

Liquidity Horizon

- When do you want your money back?

Cash Flow vs Wealth Increase

- Is cash flow a requirement right now? Or are you more focused on increasing your wealth?

Diversification

- Increase diversification
- Investing streams
- Investment providers
- Liquidity horizon
- Geographical markets

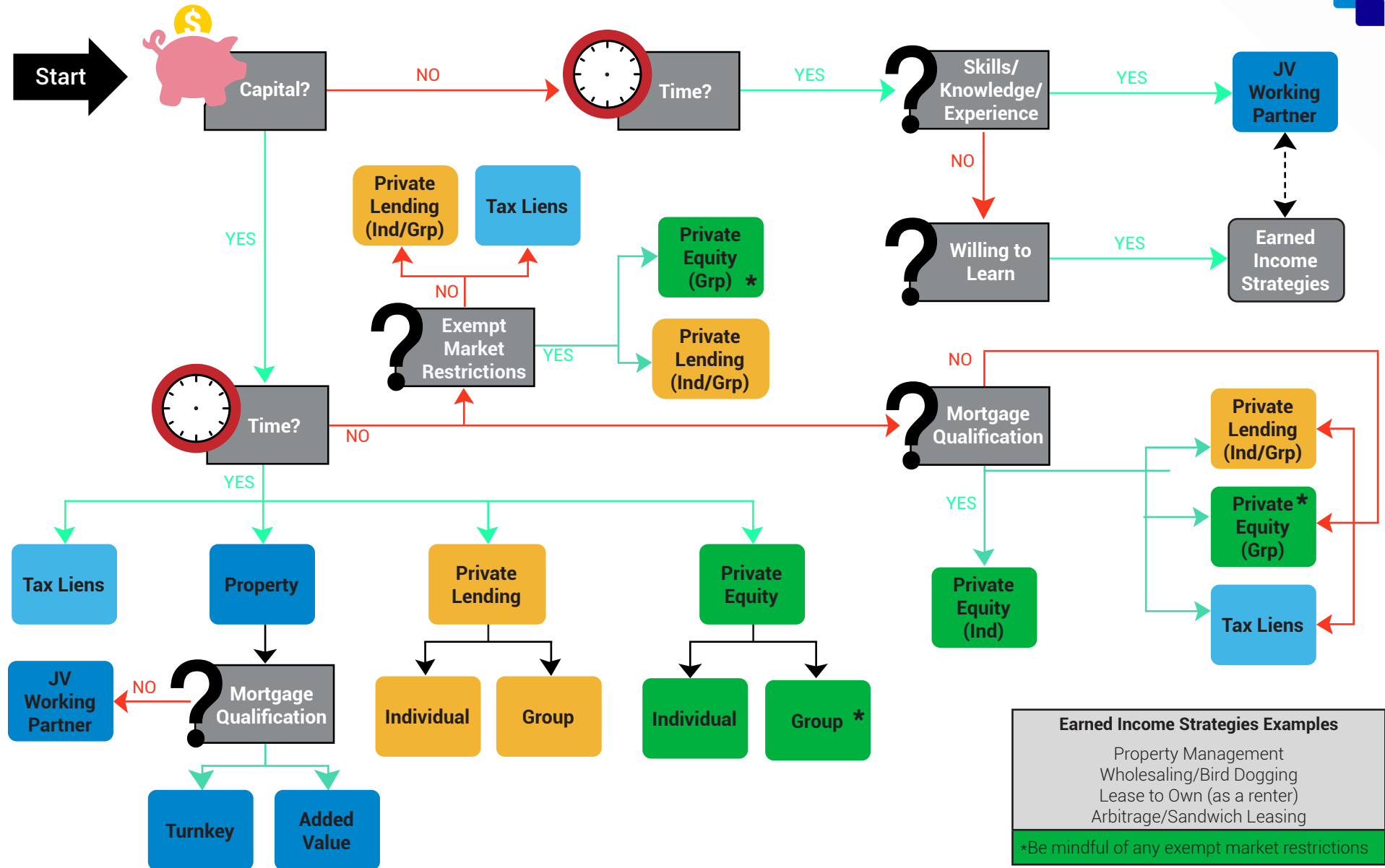
Minimum ROI

- What is your minimum acceptable Return on Investment?
- Where is the capital coming from?
- Can you obtain a higher ROI from comparable investments?

Name:

Date:

THE INVESTMENT FILTER™



Name:

Date:

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Liquidity Horizon

- | | | |
|--------|-------------------|-----------------------------|
| Short | 1 year or less | Private Lending (Ind) |
| Medium | 1–5 years | Private Lending (Ind & Grp) |
| Long | More than 5 years | Property, Private Equity |

Investment	Cash Flow	Wealth Increase
Property - Added Value	✓	✓
Property - Turnkey	✓	✓
Private Lending - Individual	✓	
Private Lending - Group	✓	
Private Equity - Individual	✓	✓
Private Equity - Group		✓
Tax Liens		✓

- Are you diversifying?
- Look at your current portfolio; are you heavily invested in one stream? Is it time to diversify to minimize risk?

- What's the minimum ROI you're willing to accept? Where is your capital coming from? Can you obtain a higher ROI from comparable investments?
- Minimum ROI: _____%

Date: