

ATTENDEE INFORMATION

Name: _____

Occupation: _____

Email: _____

If you have a guest attending with you, what is their full name? _____

CHECK THE STRATEGIES THAT ARE MOST IMPORTANT TO YOU

Passive Investing: Lease-to-Own Buy and Hold Multi-Family (2-4 or 5+ units) Commercial (mixed use, office, retail, industrial) Tax Liens & Deeds

Active Investing: Rehabbing Flipping Wholesale

Fully Passive: Private Lending (Group/Individual) Land Development Real Estate Investment Trusts

Other: Asset Protection Corporate Structure Investing in other countries

Which Best Describes You On Your Real Estate Investing Journey? (check one)

Renter to Home Owner Home Owner to Investor Investor to Business Owner

Goals

What is your level of motivation? (check one)

0-4	5-6	7-8	9-10	10+
<input type="checkbox"/>				

How many hours per week can you commit to the business? (check one)

0-4	5-6	7-8	9-10	10+
<input type="checkbox"/>				

What are your top three financial/lifestyle goals?	1.
	2.
	3.
What's holding you back from realizing these goals?	
What are you willing to do to achieve your goals?	

Having greater access to capital, such as credit cards, lines of credit, retirement accounts and equity, provides increased flexibility for your real estate investment business.

Regardless of your initial circumstances, your Strategist will support you. Sharing more information will enable your Strategist to better assist you

REAL ESTATE INFORMATION

TYPE OF PROPERTY	OWN or RENT?	HOW LONG?	MONTHLY PAYMENT	CURRENT MKT VALUE	MORTGAGE AMOUNT	EQUITY AVAILABLE
PRIMARY RESIDENCE						
SECONDARY RESIDENCE (Ex. Cottage)						
INCOME PROPERTIES (Describe)		HOW LONG?	MONTHLY PAYMENT	CURRENT MKT VALUE	MORTGAGE AMOUNT	EQUITY AVAILABLE
1)						
2)						
3)						

FINANCIAL INFORMATION

COMBINED HOUSEHOLD INCOME: <i>check the box that best applies to you</i>						
BANK ACCOUNT(S)	< \$1-5K <input type="checkbox"/>	\$5-15K <input type="checkbox"/>	\$15-25K <input type="checkbox"/>	\$25-50K <input type="checkbox"/>	\$50-100K <input type="checkbox"/>	\$100K+ <input type="checkbox"/>
UNSECURED/PERSONAL LINE(S) OF CREDIT	< \$1-5K <input type="checkbox"/>	\$5-15K <input type="checkbox"/>	\$15-25K <input type="checkbox"/>	\$25-50K <input type="checkbox"/>	\$50-100K <input type="checkbox"/>	\$100K+ <input type="checkbox"/>
SECURED LINE(S) OF CREDIT / HELOC	< \$1-5K <input type="checkbox"/>	\$5-15K <input type="checkbox"/>	\$15-25K <input type="checkbox"/>	\$25-50K <input type="checkbox"/>	\$50-100K <input type="checkbox"/>	\$100K+ <input type="checkbox"/>
401k, 403b, IRA, ROTH IRA, ANNUITIES, HSA, ESA	< \$1-5K <input type="checkbox"/>	\$5-15K <input type="checkbox"/>	\$15-25K <input type="checkbox"/>	\$25-50K <input type="checkbox"/>	\$50-100K <input type="checkbox"/>	\$100K+ <input type="checkbox"/>
OTHER MONEY SOURCES (Stocks, Bonds, CDs, Money Market)	< \$1-5K <input type="checkbox"/>	\$5-15K <input type="checkbox"/>	\$15-25K <input type="checkbox"/>	\$25-50K <input type="checkbox"/>	\$50-100K <input type="checkbox"/>	\$100K+ <input type="checkbox"/>

TYPE(S) OF CREDIT CARD(S)	CREDIT LIMIT	BALANCE OWING	CREDIT AVAILABLE

CHECK WHICH OF THE FOLLOWING APPLIES TO YOU:

- Lifestyle Freedom:** Your end goal is to reach your *Lifestyle Freedom Day* - the day when your passive income meets or exceeds your lifestyle expenses,
- Community:** You are looking for a community of like minded individuals.
- Control:** You want to feel in control of your future. You want the stability and security in seeing that your future can be bigger than your past.
- Coachable:** You are coachable. You're looking to improve and get better, and are open to other people helping you do this.
- Patient:** You know that all your problems will not be solved immediately, and all your goals will not be reached right away.
- Mindset:** You are willing to consider new opportunities. You see possibility where others see limitations.
- Change:** You are looking to change your current situation and you are motivated to make this happen.
- Attitude:** You try your best to treat people well. You are eager to learn and enthusiastic about possibility.

AND if one of the following are true:

- Income:** Employed with a minimum \$100,000 in combined household annual income. You own your home, have access to a minimum of \$25,000 in capital and a positive net worth.

OR

- Drive:** You are willing to work hard, smart and with a sense of urgency. You will invest your time and are willing to work. You have a unique or valuable skill or capability or are willing to work hard to develop one.

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Date: _____ Signature of Attendee: _____