



Investor Interview

Date: _____ Client Name(s): _____

Client E-mail: _____

Home Phone: _____ Cell Phone: _____

Current Street Address: _____

City: _____ State: _____ Zip Code: _____

Do you have a spouse? Yes No

Do you have children? Yes No If so, How many? _____

Are you currently working with a real estate agent? Yes No

PART I: Investor Goals Questions

1. What are your specific reasons for investing in real estate?

2. What are your specific goals for the property as an investment? You may choose to include personal information.

Part II: Investor Type Questions

1. Have you purchased residential property before?

- Yes
- No

2. How many times have you purchased residential property?

- Never
- 1 time
- 2 times
- 3 times
- More than 3 times

3. Do you own a vacation home?

- Yes
- No



Investor Interview

4. Have you ever rented out your primary residence?
- Yes
 - No
5. Have you ever purchased a residential property as an investment?
- Yes
 - No
6. How many residential investment purchases have you made?
- None
 - 1
 - 2
 - 3
 - More than 3
7. How many residential investment properties do you currently own?
- None
 - 1
 - 2
 - 3
 - More than 3
8. How often do you purchase residential investment properties?
- Never (only primary residence purchases)
 - Once every 7 years or more
 - Once every 3 years
 - Once a year
 - More than once a year
9. Have you ever bought property needing significant repairs or improvements?
- No
 - Yes

PART 2: Investor DNA Questions

DESIRE

10. Where would you like to buy?
11. What is your strategy for the property as an investment (select all that apply)?
- Cash flow
 - Rehab & resell
 - Appreciation (equity)
 - Retirement
 - Build equity to re-leverage
 - Other (notes)



Investor Interview

12. What type of property do you intend to purchase?

- Condo
- Single family detached
- Duplex
- Triplex
- Fourplex

13. How long do you plan to hold the property?

- Less than 6 months
- 6 months to 3 years
- 3-10 years
- 10+years

14. What are your short-term investment goals?

- Immediate cash flow
- Eventual cash flow
- Equity/appreciation
- Reselling for profit

15. What are your long-term investment goals?

- Cash flow
- Equity/appreciation
- Retirement asset
- Re-leveraging or multiple properties

NEED

16. How much cash flow do you need to see in the first year?

- Not a consideration
- Less than \$1,000
- Less than \$3,000
- \$3,000 or more

17. What is your required return on investment in the first year?

- 1-5%
- 5-10%
- 10-20%
- 20% or more

18. Do you have a specific timetable for closing on or reselling a property?

Closing:

- Within 180 days
- 180 days to a year from today
- 1-2 years from today
- No



Investor Interview

Resale:

- Less than 1 month from closing
- Less than 3 months from closing
- Less than 6 months from closing
- Within a year of closing
- 1-3 years
- 3-10 years
- 10+years
- No

Ability

19. Are you comfortable buying properties needing maintenance and repairs?

- No
- Yes, but only if minor (under \$1,000)
- Yes, but only if limited (under \$5,000)
- Yes

20. How much do you plan to put down on your investment purchase?

Percentage:

- 20%
- 25%
- 30%
- 35%
- 40%
- 50%
- 60+%
- Plan to purchase all cash

Amount:

- Less than \$10,000
- \$10,000-\$20,000
- \$20,000-\$30,000
- \$30,000-\$40,000
- \$40,000-\$50,000
- \$50,000-\$75,000
- \$75,000-\$100,000
- More than \$100,000