

INVESTOR QUESTIONNAIRE

Hopkins Financial Services, Inc., recognized the information provided below is very personal and confidential. We use this information only to increase our investment services to you. We appreciate all the information you are willing to provide and we look forward to establishing a long-term relationship with you.

CONTACT INFORMATION:

Full Name: _____

Address: _____

City: _____ State _____ Zip _____

Home Phone #: _____ Fax: _____

Cell Phone #: _____ E-mail: _____

Company/Employer: _____

Work Phone #: _____ Title: _____

INVESTMENT BACKGROUND:

Assets: \$ _____ Liabilities: \$ _____ Net Worth \$ _____

Do you currently invest in real estate loans or directly in real estate: Yes _____ No _____

If Yes, what type: _____

INVESTMENT PREFERENCES:

Funds Immediately Available to Invest: \$ _____

Size of Loan Investment Preferred: Minimum \$ _____ Maximum \$ _____

Minimum Yield Requirement: _____% Maximum Loan to Value: _____% Maximum Term: _____ Years

Types of Property (check all that apply): Residential Commercial Farm & Ranch Bare Ground

Would you consider a direct real estate investment/purchase: Yes _____ No _____

Types of Property (check all that apply): Residential Commercial Farm & Ranch Bare Ground

Please provide any additional information on the types of loans or real estate investment that you prefer and why:

Please check here if you would like to receive real estate investment opportunities from Hopkins Financial Services, Inc. by e-mail. *(This e-mail is not shared or sold to third parties.)*

Please mail, fax, or email this form to:
HOPKINS FINANCIAL SERVICES, INC.
910 E. Carol St. • Meridian, ID 83646
Phone: (208) 467-5467 • Fax (208) 323-0667
blmurphy@hopkinsfinancial.com
www.hopkinsfinancial.com

INVESTOR QUESTIONNAIRE DIRECTIONS:

We are providing you with directions to fill out the Investor Questionnaire form so you understand how and why you should complete the form:

CONTACT INFORMATION

Name, Address, & Phone Number:

Please provide the best information so we are able to contact you.

Occupation:

Provides us with general background about the companies or industries that are familiar to you.

INVESTMENT BACKGROUND

Assets, Liabilities & Net Worth:

We do not require this information but providing this financial information will allow us to understand and advise you with respect to your overall investment portfolio and strategy.

Our general philosophy is an individual should invest no more than 10% of their net worth in 1 individual loan. Additionally we believe an investor should invest 20%-40% of their portfolio into real estate secure loans.

Do you currently invest in real estate loans or directly in real estate:

If you currently invest in real estate we would like to know so we understand your background, history and knowledge of real estate investments.

INVESTMENT PREFERENCES:

Funds Immediately Available to Invest:

Insert the amount of money you have available to invest at this time. We will then be able to contact you to let you know investment(s) that are available now.

Size of Loan Investment Preferred:

List the minimum and maximum amount of a loan you would like to fund.

Minimum Yield Requirement:

Input the % of return of loan investment you prefer. Typically between 7% - 12%.

Maximum Loan to Value:

List the highest % of loan to value you would consider. Typically between 50% - 80% LTV.

Maximum Term:

Insert the number years you are willing to have your funds invested in a loan. Typically between 1 year - 10 years.

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