

Welcome! Tell us your investment goals so we can match you with the right multifamily syndication deals. Join our community to start building long-term wealth through strategic real estate. Your information is kept strictly private, and this form is non-binding with no obligation.

Investor Profile

Full Name:

Email Address:

Phone Number:

Mailing Address:

Investment Experience

What best describes your experience with real estate investing?

- ☐ None
- ☐ Personal Residential Ownership Only
- ☐ Active Landlord (Single-Family or Multifamily)
- ☐ Previous Passive Investor in Syndications
- ☐ Other:

Primary Investment Goal

Select your primary objectives (check all that apply): Please check all that apply, as there are no right or wrong answers.

- ☐ Capital Preservation (prioritize protecting principal; conservative strategy)
 - ☐ Reliable Monthly Cash Flow (steady distributions; e.g., quarterly income)
 - ☐ Long-Term Appreciation (growth in property value over time; equity build-up)
 - ☐ Tax Advantages (depreciation/K-1 losses; potential 1031 strategies)
 - ☐ Portfolio Diversification (spread risk across markets/assets beyond stocks)
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Accredited Investor Status

Accredited investor criteria (check all that apply). Why we ask this: this helps determine which offerings may be available, and selecting "Not sure" is okay.

- ☐ Income over \$200,000 in each of the last two years (or \$300,000 jointly) with expectation of the same this year
- ☐ Net worth over \$1,000,000 (excluding primary residence)
- ☐ Sophisticated investor (able to evaluate the merits and risks of the investment)
- ☐ Not Sure / Prefer to discuss

If you selected "Sophisticated investor," briefly explain why:

Investment Capacity

What is your approximate target investment amount per opportunity? Why we ask: This helps us match you with relevant opportunities and investment minimums—approximate ranges are fine.

- ☐ \$50,000 - \$99,999
- ☐ \$100,000 - \$499,999
- ☐ \$500,000 - \$999,999
- ☐ \$1,000,000 +

Funding Source / How You Prefer to Invest

- ☐ Retirement funds (e.g., IRA/401(k) via custodian)
 - ☐ Self-directed IRA
 - ☐ Personal funds (cash/brokerage)
 - ☐ Entity (LLC/LP/Trust)
 - ☐ Other: _____
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Communication Preferences

How would you prefer to receive updates on investment opportunities? We ask this so we can contact you in your preferred way and respect your inbox and phone.

- ☐ Email
 - ☐ Phone Call
 - ☐ SMS/Text Message
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Certification: I certify that the information provided in this form is true, complete, and correct to the best of my knowledge.

Signature: _____ Date: _____

Signature (Co-Investor/Spouse, if applicable): _____ Date: _____

Disclaimer & Submission

Disclaimer: This Passive Investor Interest & Qualification Form is not a solicitation to sell securities. It does not constitute an offer to sell or a solicitation of an offer to buy any security. Any future investment offerings will be made solely through formal Private Placement Memorandums (PPMs) provided to qualified investors in accordance with applicable federal and state securities laws. Submission of this form represents a non-binding expression of interest and grants permission to contact you regarding educational content and future opportunities.

Submit Your Interest