

INVESTOR WORKSHEET INSTRUCTIONS

Attached is our Investor Worksheet, this provides us with pertinent information that we need to process your future investment.

Please note, the Investor investing (item #6) will determine how the mortgage security in this investment is recorded against the real property (**If your investment is vested in a Trust, we will need a copy of the Trust for our files.)

There are many ways to hold Title, a few examples are as follows:

- Husband and Wife as Joint Tenants
- Community Property
- Tenants in Common
- Trust
- Sole & separate property
- Single or unmarried

This form is NOT an election for an investment, only to provide us with information to process your investment request.

Investor Information Worksheet

Please complete the following:

1. **Investor Name:** _____
2. **Investor Address:**
 If a P.O. Box – physical address: _____
3. **Investor Tax ID:** _____ **Co-Investor Tax ID:** _____
4. **Investor Telephone:** _____ **Fax (if applicable/or 2nd phone number)** _____
5. **Investor Mobile:** _____ **Investor e-mail address:** _____

HOW YOU HOLD TITLE TO YOUR INVESTMENT COULD HAVE SERIOUS TAX CONSEQUENCES. IT IS STRONGLY RECOMMENDED THAT YOU SEEK TAX AND/OR LEGAL COUNSEL WHEN COMPLETING THIS SECTION (6).

6. **Investor Vesting:** _____
7. ***Alternative Address or account name for checks (i.e. bank name, address and Account):**

8. **Additional Information/Comments:**

I understand that by signing this document I am certifying the above information to be true and accurate

