



EQUINOX
REALTY PARTNERS

BROKERAGE • INVESTMENT • MANAGEMENT

COMMERCIAL REAL ESTATE INVESTOR QUESTIONNAIRE

THIS INFORMATION IS FOR THE PRIVATE USE OF EQUINOX REALTY PARTNERS, LLC. WE WILL NOT SELL OR SHARE THIS INFORMATION.

Name: Mr. Mrs. Ms _____

Address: _____

City: _____ State _____ Zip _____

Phone# _____ Mobile# _____

Fax# _____ Email _____

HAVE YOU EVER PURCHASED COMMERCIAL REAL ESTATE? Yes No

IF YES, WHAT TYPE OF COMMERCIAL REAL ESTATE HAVE YOU PREVIOUSLY INVESTED?

- | | |
|---|--|
| <input type="checkbox"/> Multi-Family 5 - 25 Units Multi- | <input type="checkbox"/> New Construction |
| <input type="checkbox"/> Family 25 - 100 Units Multi- | <input type="checkbox"/> Vacant Land |
| <input type="checkbox"/> Family 100 - 200 Units Multi- | <input type="checkbox"/> Portfolios |
| <input type="checkbox"/> Family 200 or more Units | <input type="checkbox"/> Condo Conversions |
| <input type="checkbox"/> Commercial: Industrial | <input type="checkbox"/> Rehab(s) |
| <input type="checkbox"/> Commercial: Office / Retail | <input type="checkbox"/> Mortgage Notes |
| <input type="checkbox"/> Commercial: Development | <input type="checkbox"/> Tax Liens |
| <input type="checkbox"/> Senior Housing | <input type="checkbox"/> Foreclosures |
| <input type="checkbox"/> Pre-Sale(s) | <input type="checkbox"/> Other _____ |

ARE YOU CURRENTLY INVESTED IN COMMERCIAL REAL ESTATE? Yes No

IF YES, WHAT TYPE OF COMMERCIAL REAL ESTATE ARE YOU CURRENTLY INVESTED?

IF YES, DO YOU (or) WILL YOU MANAGE YOUR OWN COMMERCIAL PROPERTY? Yes No

WHAT IS YOUR APPROXIMATE COMMERCIAL REAL ESTATE INVESTMENT BUDGET?

- | | |
|--|--|
| <input type="checkbox"/> Less than \$100,000 | <input type="checkbox"/> \$500,000 - \$1,000,000 |
| <input type="checkbox"/> \$100,000 - \$250,000 | <input type="checkbox"/> \$1,000,000 - \$3,500,000 |
| <input type="checkbox"/> \$250,000 - \$500,000 | <input type="checkbox"/> \$3,500,000 - _____ |

WHEN DO YOU PLAN ON INVESTING?

- 0 - 3 mo. 3 - 6 mo. 6 - 12 mo. 1 - 2 yr.

WHAT IS YOUR APPROXIMATE DOWN PAYMENT BUDGET?

- | | |
|--|--|
| <input type="checkbox"/> Less than \$100,000 | <input type="checkbox"/> \$500,000 - \$1,000,000 |
| <input type="checkbox"/> \$100,000 - \$250,000 | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> \$250,000 - \$500,000 | |

WHAT AREAS ARE YOU PLANNING TO INVEST?

- Florida / Specify Location(s) _____
- Georgia / Specify Location(s) _____
- Other / Specify Location(s) _____

WHAT TYPES OF COMMERCIAL REAL ESTATE ARE YOU CURRENTLY INTERESTED IN INVESTING?

- | | |
|---|---|
| <input type="checkbox"/> Multi-Family 5 - 25 Units Multi- | <input type="checkbox"/> Vacant Land |
| <input type="checkbox"/> Family 25 - 100 Units Multi- | <input type="checkbox"/> Condo / Hotel |
| <input type="checkbox"/> Family 100 or more Units | <input type="checkbox"/> Mortgage Notes |
| <input type="checkbox"/> Commercial: Industrial | <input type="checkbox"/> Tax Liens |
| <input type="checkbox"/> Commercial: Office / Retail | <input type="checkbox"/> Foreclosures |
| <input type="checkbox"/> Commercial: Development | <input type="checkbox"/> Other _____ |

WHICH PROPERTY CLASSES INTEREST YOU?

Class A

Class C

Property ready to take over and run

Property needs work but is ready to rent

Class B

Class D

Any

Other _____

WHAT IS YOUR INVESTMENT STRATEGY?

Short Term (Flip / Pooled Investment)

Long Term (Buy / Hold)

Both

Undecided

HOW WILL YOU FINANCE YOUR COMMERCIAL REAL ESTATE INVESTMENT(S)?

Conventional

Non- Conventional

Creative (Owner Carry Back)

Hard Money Loan

Private Money Loan

2nd Mortgage

Cash

Self -Directed IRA

1031 Exchange

Other _____

WHAT ARE YOUR KEY MOTIVATORS FOR INVESTING IN COMMERCIAL REAL ESTATE?

Cash Flow

Tax Shelter

Life Style Change

Career Change

Retirement

Other _____

WHAT SERVICES WILL YOU NEED FOR YOUR COMMERCIAL REAL ESTATE INVESTMENT(S)?

Real Estate Broker

Mortgage Broker / Lender

Lawyer

CPA

Asset Management

Insurance

Inspector(s)

Contractors

1031 Intermediary

Property Manager

Other _____

IDENTIFY ANY SPECIAL SKILL, TRADES OR RESOURCES YOU HAVE THAT WILL HELP DEVELOP YOUR COMMERCIAL REAL ESTATE INVESTMENT PORTFOLIO.

Professional Skill / Experience _____

Special Skill / Trade _____

Other Resources

ARE YOU INTERESTED IN INVESTING WITH AND/OR PARTNERING WITH OTHER INVESTORS WITH LIKE KIND INTEREST AND GOALS? YES NO

PLEASE SELECT ALL TOPICS YOU WOULD FIND HELPFUL WITH YOUR COMMERCIAL REAL ESTATE INVESTMENT(S)

- | | |
|---|---|
| <input type="checkbox"/> Finding a Good Deal | <input type="checkbox"/> Reliable Contractors |
| <input type="checkbox"/> Rehabbing Properties | <input type="checkbox"/> Exit Strategies |
| <input type="checkbox"/> Due Diligence | 1031 Exchanges |
| <input type="checkbox"/> Property Management | <input type="checkbox"/> Other _____ |

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