**NEW CLIENT INTAKE FORM:**

**Introducer Name:**

Phone:

Email:

Date:

**NEW CLIENT INFORMATION:**

Client Fname: Lname:

Company:

Phone: Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address:

City: St: Zip:

Preferred Method of Contact (circle): Phone / Email

Website:

Facebook.com/ LinkedIn.com/in/

Deposit Made: Y / N Deposit Details: $

Date: To:

Number of Properties Being Acquired Now (circle): 1 2 3 4 5+

Desired # of Properties to be Acquired in Next 12 months (circle): 0 1 2-5 5-10 11-20

Number of Properties Owned Now (circle): 0 1 2-5 5-10 11-20 21-40 40+

Anticipated Dollar Amount to Be Invested in Next 30 Days: $

Will You Be Purchasing with (circle): All Cash Conventional Loan

Hard Money Self-Directed IRA Other:

If acquiring a loan have are you pre-qualified? Y / N If yes, please provide letter.

How did you find out about the program?

Level of Experience: 0-1 / 1-2 yrs. / 2-5 yrs. / 5-10 yrs. / 10+ yrs.

Main Goal of Acquiring these Properties:

Below for Internal Use Only:

Form Information Verified: Y / N

Approved: Y / N

Notes:

Date:

Completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_