

Bridge Partners Client Profile

Please complete all 3 pages

Personal and Family Information

Name:			DOB:	
Spouses Name:				
Mailing Address:				
City/State/Zip				
Children Name(s)	Age(s)	Telephone Numbers		
		Home:		
		Fax:		
		Pager:		
		Mobile:		
		eMail:		

Investment Objectives

Amount you have to invest:	
Source of Investment Capital:	
if 1031, What is the Equity Exchange?	
How much debt do you have?	
What is your approximate net worth?	
Investment Objective Goals:	

Affiliates

Telephone Numbers

Your Employer:		
Spouses Employer:		
Attorney:		
Banker:		
C.P.A.:		
Financial Advisor:		

Partner Information

#1 Partner's Name:		Voice: () -
Address:		Fax () -
City/State/Zip:		eMail:
Partner's Approximate Net Worth		
Partner's Co-Investment Amount:		
Your Authorization to Contact?	YES NO	
#2 Partner's Name:		Voice: () -
Address:		Fax () -
City/State/Zip:		eMail:
Partner's Approximate Net Worth		
Partner's Co-Investment Amount:		
Your Authorization to Contact?	YES NO	

I certify that the above information is correct.

Signature

Date

Personal Financial Statement

Net Income			
	2006 (est.)	2005	2004
Wages:			
Securities or Mutual Funds:			
Business Interests:			
Real Estate:			
Other Income:			
TOTAL NET INCOME:			

Current Net Worth	
Cash Equivalents:	_____
Securities or Mutual Funds:	_____
Business Interests:	_____
Real Estate:	_____
Other Assets:	_____
TOTAL CURRENT ASSETS:	_____
TOTAL CURRENT DEBTS:	_____
TOTAL NET WORTH	_____

Business, Financial and Investment Experience and Expertise		
Occupation/ Profession:	_____	
Business/Financial Experience:	_____	
Degrees & Designations:	_____	
	Number of Properties	Number of Units
Current Real Estate Investments:		
Prior Real Estate Investments:		
# of Years of Real Estate Investment Experience:		
Other Related Experience and Expertise:	_____	

Investment Objective Details

I am interested in (Circle all that apply):

Rehab Properties	2-10 Unit Properties	11-30 Unit Properties
31-50 Unit Properties	51-100 Unit Properties	101(+) Unit Properties
Commercial Properties	Office Properties	Vacant Land
Shared Equity Services		

This is not an offer to sell or a solicitation to purchase an investment or security. This information relates to possible real estate opportunities for qualified purchasers who have established an existing substantive relationship with Bridge Partners, Inc. Natural persons qualify as investors by virtue of such pre-existing relationships and by proof of business experience, income, and net worth.

I certify that the above information is correct.

Signature

Date

Readiness & Personality Questionnaire

Please rate how strongly you agree with the statements below based on the rating range. The higher the number used the more you agree with the statement. Do not read into the statement, your first reaction works best. Please do not use numbers outside the statements allocated range.

	Statement	Scale	Your Rating
1	When purchasing you own home you find it important to use a broker.	1 - 5	
2	When purchasing an investment you find it important to use a broker.	1 - 5	
3	It is highly important to me that I make my own investment decisions.	1 - 10	
4	I have a good understanding of real estate principles.	1 - 10	
5	I have a good understanding of how real estate markets and cycles work.	1 - 10	
6	I am willing to take more risk to gain higher returns.	1 - 10	
7	If an investment was not working as well as you thought it should, you would want to sell it and move on.	1 - 5	

Scenario #1

Suppose that you are offered two properties, the first is in poor area and is older. It has high income and can be bought for less than the second property. The second property is in a highly desirable area but is higher priced and has less income. Based on this scenario, please rate the following:

8	The first property is more desirable.	1 - 10	
9	if these proeptrties are out of my home area I would need a broker's help in choosing which property is a better investment.	1 - 5	
10	If you purchased the seond property and it did not generate positive cash flow in the first year, you would want to sell it.	1 - 10	
11	If you purchase the first property and it was making money but it was management intensive, you would want to sell it.	1 - 10	
12	You purchased the first property and it did not make money, you would hire new management.	1 - 5	
13	You purchased the second property and it did not make money, you would hire new management.	1 - 5	

Scenario #2

You are presented with two investment. Both can be purchased with the same amount down. The first investment is three single-family homes. The second investment is a five-plex. Based on the scenario, rate the following:

14	The first investment is better because the homes are more easily sold.	1 - 10	
15	The first investment is better because the homes would increase in value faster.	1 - 10	
16	The second investment is better because it would provide more cash flow.	1 - 10	

Scenario #3

The area is unfamiliar, you are interested in possible investments. Based on this scenario rate the following:

17	In this situation I would first tour the area with a local broker.	1 - 5	
18	In this situation I would first study the areas demographics.	1 - 5	
19	In this situation I would first explore the area myself.	1 - 5	

Scenario #4

You made an offer on a property and the seller counters your offer. The sellers' counter seems ambiguous. Based n this scenarion, please rate the following:

20	In this situation I would rely on my brokers explanation.	1 - 5	
21	I would seek the help of an attorney.	1 - 5	
22	I would contact the seller for an explanation.	1 - 5	

Select circle one statement per line that best reflects your investment personality:

I am a past investor	OR	This is all new to me
I need higher returns	OR	I prefer less risk
I am more hands on	OR	I prefer to delegate
I like to work in groups	OR	I prefer to work alone