

Potential Private Lender Form

(Printable Version from www.HeritageHomeBuyers.net)

This form can be printed and faxed to our office at (614) 338-0500. If you do not have access to a fax machine, you can send a fax from your local Kinko's Copy Center, office supply store (e.g. Staples), or large grocery store (e.g. Kroger or Meijer).

Today's Date: _____

How did you find out about our website? _____

If you used a Search Engine to find us, which one did you use?

If you remember, please tell us what you typed in the Search Engine to find us?

Name: _____

Mailing Address: _____

Office/Work Phone: _____

Home Phone: _____

Cell Phone: _____

Personal Fax Number: _____

Email: _____

What types of investments are you currently doing? (Please check all that apply)

- Savings Account
- CDs
- Money Market Account
- Stocks
- Mutual Funds
- Buying and Selling Real Estate
- Rental Property
- Loaning Money to Other Investors for Real Estate Deals
- Other (Please specify): _____

What (approximate) rate of return have you been getting on your current investments? _____

Do you think 6% - 10% is a good return for a safe, secure, hands-off, passive investment? **Yes / No**

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Have you had a chance to review our FREE Special Report entitled "*How to Earn 6%-10% On Your Money, Guaranteed, and Secured by Real Estate as a Private Lender!*"? **Yes / No**

Do you have an IRA? **Yes / No**

Are you aware that you can use an IRA to do real estate related investments? **Yes / No**

Prior to finding out from us, were you aware that you could use an IRA to do real estate related investments? **Yes / No**

Within the next 90 days, what is the total amount would you like to get started investing in our Private Lending Program? _____

- Is this amount available now? **Yes / No**
- If "No", how soon do you expect that this amount be will be available?

Will any portion of the money you want to loan to us be coming from an IRA? **Yes / No / Not Sure Yet**

If "Yes", please answer the following questions:

What company is your IRA set up with now (i.e. who is your current IRA Custodian)?

IRA Custodian Website Address: _____

IRA Custodian Phone Number: _____

What amount of money would you like to loan from your IRA? _____

Of the money you want to loan to us right now (including any money inside OR outside of an IRA) what amount of that money is NOT in a cash position? In other words how much of the money will you need to access by FIRST selling stock, or selling mutual funds, etc. (please explain)?

NOTE: The reason we ask the above question is that it takes more time to convert certain assets, than it does other assets, to a cash position. We have to take the timing element into account in order to efficiently match your funds to the appropriate investment opportunity.

Thank you for taking the time to fill out our form and trusting us with your hard-earned capital. We take the responsibility to invest and/or steward your money very seriously. We'll make every effort try to match your funds up with a Private Loan, Secured by Real Estate within the next 90 days...

Additional Questions or Comments? _____