



Name: _____

Phone: _____

1. What is your current occupation?

2. How serious are you about your Real Estate business?
 - a. Very serious.
 - b. It's one of my hobbies.
3. Our first year's financial goal for you as an investor is to replace your current annual employment income. In your case, what would that be?

4. Briefly describe what Real Estate investing experience you have. (For Instance, how many deals have you completed and what type of deals, such as, Buy & Hold, Fix & Flip, etc.)

5. What is your TARGET monthly passive income/revenue?

6. How long have you been involved in Real Estate?
 - a. Less than 6 months
 - b. 6 months to 1 year
 - c. 1 year to 3 years
 - d. 3 years to 5 years
 - e. 5 years or more
7. What roadblocks or challenges have prevented you from being as successful as you want to be? (Time, commitment, finances, family, lack of deals, etc.)

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8. How many Real Estate FLIPS (Purchased, Rehabbed, Sold) have you completed so far in your career?
 - a. None
 - b. 1 to 3 deals
 - c. 3 to 5 deals
 - d. 5 to 10 deals
 - e. Over 10 deals

9. On average, how much profit did you make off each FLIP?

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10. Have you ever wholesaled a property?
 - a. If Yes, how many? _____

11. Do you own any property free and clear? If Yes, how many? _____

12. Assuming that you are doing any kind of Real Estate marketing, how many leads do you have coming into your funnel every week?
 - a. Not currently marketing
 - b. 1 to 5 leads
 - c. 5 to 10 leads
 - d. Over 10 leads

13. How many deals do you think you have walked away from because you didn't have the \$?

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14. All lenders require cash brought to the closing table and cash reserves. In your case, how much cash and credit do you have available today?

- | <u>CASH</u> | <u>CREDIT</u> |
|-------------------|-------------------|
| a. Less than \$3K | a. Less than \$3K |
| b. \$5K-10K | b. \$5K-10K |
| c. \$10K-20K | c. \$10K-20K |
| d. \$20K-30K | d. \$20K-30K |
| e. \$30k+ | e. \$30K+ |

15. Do you currently have a Mentor or Real Estate Coach?
 - a. Yes
 - b. No

c. No, but I know I need one

16. If there is anything you could add to your training to help make you be more successful, what would it be?

17. How many hours a week can you dedicate to your Real Estate Business?

- a. 5-10 hours
- b. 10-20 hours
- c. 20-40 hours
- d. 40+ hours

18. As you know, most lenders have a minimum credit requirement. What do you believe is your current credit score?

- a. Under 600
- b. 600-650
- c. 650-700
- d. 700+

19. Any time you take out a loan, you have a monthly payment due. If you were to borrow money from Cogo Capital today, what kind of monthly payment can you afford?

- a. Under \$500
- b. \$500 to \$1,000
- c. \$1,000 to \$1,500
- d. \$1,500+

20. Why do you want to start or expand your Real Estate investment business?

- a. Retirement Planning
 - b. Replace my existing Income
 - c. Supplement my existing Income
 - d. Create both Income and Wealth
 - e. Other:
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21. What is the current status of your Real Estate investment business?

- a. I haven't started yet but I'm ready to start learning and doing today.
- b. It's a part time endeavor but I am ready to turn it into a real, full-time business.
- c. It is my full-time business, but I want to learn more and new ways to maximize it.
- d. I'm retired or retiring & need additional income.

22. What is your biggest fear or worry about Real Estate investing?

23. What is your biggest weakness when it comes to Real Estate investing?

24. What is your biggest strength when it comes to Real Estate investing?

25. What is your biggest regret as it relates to Real Estate investing?

26. Where do you see yourself in 5 years in regards to your Real Estate investing?
