

POTTS FINANCIAL SERVICES

REAL ESTATE / IRA CLIENT INFORMATION

Upon completion, please fax or send the completed Questionnaire, signed page 2 of the agreement and your recent account statement(s) to Potts Financial Services. Please use our: Fax - 1.850.222.3840 or Email - alanpotts@pottsfinancial.com or by mail - P.O. Box 10318, Tallahassee, Florida 32302.

PERSONAL INFORMATION

Your Full Name _____ Date of Birth _____

Spouse's Full Name _____ Date of Birth _____

Address _____

City _____ State _____ Zip Code _____

Home Phone _____ Work Phone _____

Email Address _____

Do You Have Children? Yes No

Name	Age
_____	_____
_____	_____
_____	_____
_____	_____

OCCUPATIONAL HISTORY

Current Occupation _____

Previous Occupation _____

Spouse's Current Occupation _____

Spouse's Previous Occupation _____

REAL ESTATE

What type of property do you own?

Primary Residence Second Home Investment Property Rental Raw Land Farm

Do you have any residential mortgages? Yes No

Primary Residence: \$ _____ Second Home: \$ _____

What do you like most about your current real estate holdings?

What type of property do you want to purchase?

Primary Residence Second Home Investment Property Rental Raw Land Farm

Purchase Price: \$ _____ Purchase Date: _____

Will a sale of your personal residence or 1031/1033 Tax Deferred Exchange be part of your real estate transaction? Yes No Net Proceeds \$ _____

Why is it important for you to use your retirement account(s) to purchase real estate?

Did you visit our website? Yes No
If yes, what did you learn?:

1. _____
2. _____
3. _____
4. _____

During the educational conference call, what did you learn about IRAs and real estate?

1. _____
2. _____
3. _____
4. _____

CURRENT RETIREMENT ACCOUNT(S)

Your Accounts

IRA: \$ _____ 401(k): \$ _____

SEP: \$ _____ Other: \$ _____

Current accounts are invested in: (Please include a recent statement)

Stocks Bonds Mutual Funds CDs Annuity Other

Your Spouse's Accounts

IRA: \$ _____ 401(k): \$ _____

SEP: \$ _____ Other: \$ _____

Current accounts are invested in: (Please include a recent statement)

Stocks Bonds Mutual Funds CDs Annuity Other

PERSONAL INFORMATION

Do you anticipate needing your IRA for retirement income? Yes, all Yes, some No

Adjusted Gross Estate (Assets - Liabilities)

Under \$ 2,000,000 \$ 2,000,000 to \$ 3,000,000 \$ 3,000,000 to \$ 4,000,000
 \$ 4,000,000 to \$ 5,000,000 \$ 5,000,000 to \$ 6,000,000

Who do you currently rely on for financial advice? Attorney CPA Other: _____

If our program works for you and your family, what requirements must be satisfied for you to proceed?

1. _____

2. _____

3. _____

PLEASE SIGN THIS FORM

The information I have provided in this questionnaire is accurate and true to the best of my knowledge.

Signature

Spouse's Signature

Date

Date