



Real Estate Experience

Investment Track Record Summary

INVESTOR INFORMATION

Full Name

Phone

Email

EXPERIENCE SUMMARY

Years in Real Estate Investing

Total Properties Owned/Managed

Total Transaction Volume (\$)

Primary Investment Strategy

PROPERTY TYPES (Check all that apply)

Single Family

Multi-Family (2-4 units)

Multi-Family (5+ units)

Commercial Office

Retail

Industrial/Warehouse

Mixed Use

Land/Development

Other: _____

RECENT TRANSACTIONS (Last 3 Years)

Property Address	Type	Purchase \$	Sale/Current \$	Date
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LENDER REFERENCES

Provide contact information for lenders you have worked with:

Lender 1 Name / Company

Contact Person

Phone/Email

Lender 2 Name / Company

Contact Person

Phone/Email