

# Virginia Housing and Community Development Corporation

## INVESTOR QUESTIONNAIRE

The community development mission of Virginia Housing and Community Development Corporation (VHDC) is to educate and empower individuals, families and minority business owners to build wealth, access capital and credit, and achieve home ownership. VHDC achieves this mission through a steady stream of wealth building initiatives, home ownership education and assistance, small business financing, and acquiring and rehabilitating distressed housing in targeted communities. The purpose of this questionnaire is to understand your investment interests and suitability for investment in VHDC's community development initiatives. We will use this information solely to match present and future investment opportunities with VHDC sponsored business and real estate projects we believe best align with your investment objectives. Your answers will be held strictly confidential.

### CONTACT INFORMATION

<b>Name</b> <i>(Last, First, M.I.):</i>		<input type="checkbox"/> M <input type="checkbox"/> F	<b>DOB:</b> Month _____ Year _____
<b>Physical Address:</b>		<b>City:</b>	
<b>State &amp; Zip Code</b>		<b>Home Phone:</b> (     )	
<b>Email Address:</b>		<b>Cell Phone:</b> (     )	

### COMPANY INFORMATION

<b>Company Name:</b>	<b>Your Position/Title:</b>
<b>Physical Address:</b>	<b>City:</b>
<b>State &amp; Zip Code:</b>	<b>Telephone:</b> (     ) <b>Ext:</b>
<b>Email Address:</b>	<b>Facsimile:</b> (     )

### INVESTOR QUALIFICATIONS

Are you a citizen of the United States?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you planning to invest funds currently in a retirement account?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you planning to invest funds owned by an investment club or partnership?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you planning to invest funds co-owned by a spouse and/or immediate family member?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you planning to invest funds from personal savings?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you planning to invest funds from business savings?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you currently have any investments in publicly traded stocks and/or bonds?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you currently have any investments in U.S. Treasury obligations (T-Bills, Notes, I-Bonds)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you currently have any real estate investments, other than your primary residence?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you currently have more than 10% interest in any U.S. business entity?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you an accredited investor? See: <a href="https://www.law.cornell.edu/cfr/text/17/230.501">https://www.law.cornell.edu/cfr/text/17/230.501</a>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a licensed real estate agent?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a mortgage originator?	<input type="checkbox"/> Yes <input type="checkbox"/> No

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## INVESTMENT OBJECTIVES

What is your preferred investment vehicle? (Check all that apply)	
Commercial Real Estate	<input type="checkbox"/> Yes <input type="checkbox"/> No
Mixed Use Property	<input type="checkbox"/> Yes <input type="checkbox"/> No
Residential Real Estate (Single-Family Residence / Multi-Family Residence)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Venture Capital (Business Loans, Equity Investments, Hybrid Investments).	<input type="checkbox"/> Yes <input type="checkbox"/> No
How much are you are planning to invest? (Check One)	<input type="checkbox"/> \$ 1,000 to \$ 5,000 <input type="checkbox"/> \$ 5,001 to \$ 10,000 <input type="checkbox"/> \$ 10,001 to \$ 25,000 <input type="checkbox"/> \$ 25,001 to \$ 50,000 <input type="checkbox"/> \$ 50,001 to \$100,000 <input type="checkbox"/> \$100,001 to \$500,000 <input type="checkbox"/> \$500,000 to \$1million <input type="checkbox"/> \$1million or more

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Your Signature: \_\_\_\_\_ Date Completed: \_\_\_\_\_

### PLEASE ANY ADDITIONAL INFORMATION REGARDING YOUR INVESTMENT INTERESTS.

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Please return the completed questionnaire to:

Virginia Housing and Community Development Corporation  
Attn: Community Development  
445 N. Main St., #1574  
Suffolk, VA 23439-0016

Thank you!