Intake Form

- For retirement account deals, please include a past account statement.
- For trust deals, please include a copy of the trust.
- Please email this completed intake form and the above documents, if applicable, to barry@equitylifellc.com.

Investor 1

Name: ____DOB: ___________________

Street address: ____

City: ___________________________State: ________ZIP code: ____________

Phone number: __________________Alternate number: __________________

Email: ____________________________Social Security Number: _________________________

Investor 2 (For joint investments only)

Name: ____DOB: ___________________

Street address: ____

City: ___________________________State: ________ZIP code: ____________

Phone number: __________________Alternate number: __________________

Email: ____________________________Social Security Number: _________________________

Investment Details

Portfolio: _______________________________Amount: ______________________________

_____Cash

______Individual ______Trust ______Corporation

OR

_____IRA

______Traditional ______Roth ______SEP

1000 Northwest Street, Suite 1200, Wilmington, DE
19801 Phone: (800) 484-6414 - www.EquityLifeLLC.com

Intake Form

Suitability (May be completed now or by the investor with the signing documents)

Employer Name: ____

Employer Address: ____

Employer Telephone: ____

Nature of Employment: ____

Position & Duties: ____

Any other occupations or duties within the past five years: ______________________________________

____

My net worth (or my net worth with my spouse, if I have one,) exceeds $1,000,000 (Y/N): _____________

I had an individual income of $200,000+ in each of the two most recent years, or if I have a my spouse, our joint income was $300,000+ in each of those two years, and I/we reasonably expect to reach the same

income level in the current year (Y/N): _______________

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