

CONTACT

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QUESTIONNAIRE FOR PROPERTY INVESTORS

Name:

Address:

Home Phone:

Mobile Phone:

Fax:

Email Address:

Property

Address	
Date of contract	
Settlement date	
Purchase price	
Vendor	
Lessor	
Lessee	
Manager	

Lawyer acting for you on purchase

Name	
Address	
How and why engaged	
Date engaged	
Advice received about purchase	
Actions in reliance on advice	
Comments	
Where is your file	

Financial adviser/broker (if any)

Name	
Address	
How and why engaged	
Date engaged	
Advice received about purchase	
Actions in reliance on advice	
Comments	
Where is your file	

Accountant (if any)

Name	
Address	
How and why engaged	
Date engaged	
Advice received about purchase	
Actions in reliance on advice	
Where is your file	
Comments	

Valuer (if any)

Name	
Address	
How and why engaged	
Date engaged	
Advice received about purchase	
Actions in reliance on advice	
Where is your file	
Comments	

Financier (if any)

Name	
Address	
How and why chosen	
Amount	
Interest rate	
Securities	
Comments	

Promotion/purchase

How introduced to property	
Promotional material received	
If so, how, when, do you still have it	
Factors relied on in purchase decision	

Losses

Acquisition costs	
Income received	
Income expected	
Expenses	
Investment lost	
Current value of property	
Other	

