

North Coast Financial, Inc.

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DRE Broker #01870870; NLMS ID 3233044

Trust Deed Investor Questionnaire

Name _____ Phone _____ Email Address _____

FUNDS

Funds available for trust deed investments: ☐ \$100k - \$250K; ☐ \$250k - \$500k; ☐ \$500k - 1.0M; ☐ Over \$1.0M

Funds available for a single trust deed: ☐ \$100k - \$250K; ☐ \$250k - \$500k; ☐ \$500k - 1.0M; ☐ Over \$1.0M

1st TRUST DEEDS

Requested yield for 1st trust deed (NCF range 7.0 - 9.5%): ☐ 7.0% - 8.0%; ☐ 8.0% - 9.0%; ☐ 9.0% +

Maximum loan to value for 1st (NCF considers up to 75%): up to ☐ 60%; ☐ 65%; ☐ 70%; ☐ 75%

2nd TRUST DEEDS

NCF arranges some 2nd trust deeds at a maximum combined LTV of 65% and a yield range of 10% to 11%

Would you be interested in considering 2nd trust deeds? ☐ Yes ☐ No

LOCATIONS OF COLLATERAL

In what geographic locations would you consider trust deed investments within California:

Northern ☐ Yes ☐ No

Central ☐ Yes ☐ No

Southern ☐ Yes ☐ No

TYPES OF LOAN COLLATERAL CONSIDERED

Residential Property, Non-Owner Occupied ☐ Yes ☐ No

Residential Property, Owner Occupied Business Use ☐ Yes ☐ No

Residential Property, Owner Occupied Consumer Use ☐ Yes ☐ No

Commercial Property ☐ Yes ☐ No

Residential Lot ☐ Yes ☐ No

PREVIOUS TRUST DEED INVESTMENT EXPERIENCE

I have previously invested in trust deeds ☐ Yes ☐ No If yes, years of experience _____

NOTE: NCF provides loan servicing on all of the loans it originates.

ADDITIONAL NOTES / PREFERENCES / COMMENTS:
