



Investor Profile Questionnaire.

Understanding your financial situation and investment objectives can help us determine which of our investment opportunities, amounts, and terms are best aligned with your investment goals.

PERSONAL INFORMATION

NAME

STREET ADDRESS

CITY

STATE

ZIP CODE

HOME PHONE

MOBILE PHONE

EMAIL

CURRENT NETWORTH

ANTICIPATED INVESTMENT AMOUNT

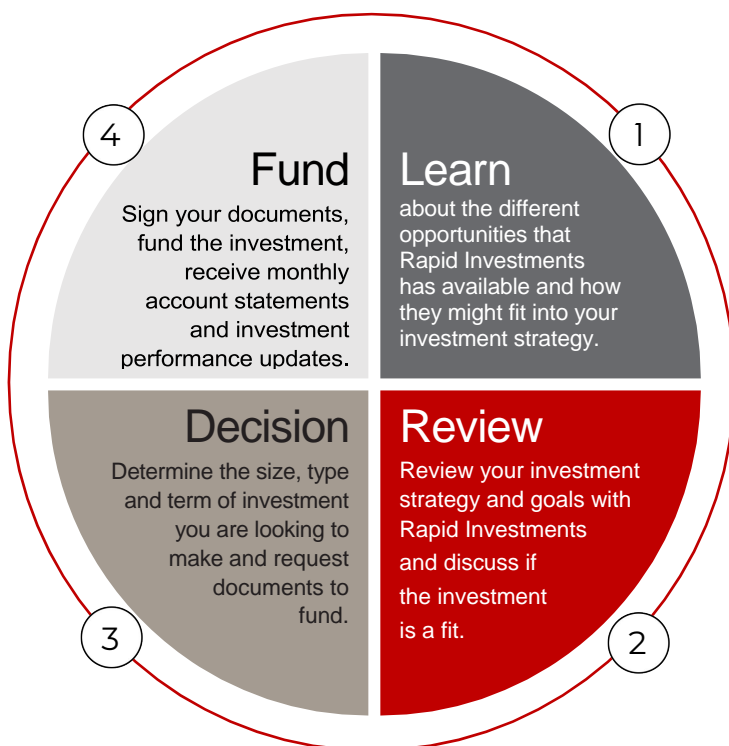
DATE OF COMPLETION

Understanding your investment portfolio and where Rapid Investment's various investment opportunities fit into your investment strategy is important.

When it comes to portfolio investment allocation, understanding where our opportunities fit into your financial picture is important.

We provide opportunities up and down the capital structure with private placements which range from long hold senior secured debt with relatively low risk and decent income earning potential to higher risk debt and equity opportunities best suited for aggressive growth strategies.

During your interview we will review this investment profile to understand your personal investment objectives and make sure any investment you are looking to make with Rapid Investments, is aligned with your investment objectives and appetite for risk.



Financial Professionals Welcome

If you have a financial planner, family office manager or attorney who represents you in financial matters, we welcome them being involved in the planning, review and investment process. Please make sure to let us know who you typically work with and let us involve them.

Important considerations when making investment decisions:

Your Time Horizon

When will you begin withdrawing your money from the investment, and at what rate? If that date is many years away, you may be comfortable with an investment that carries a greater potential for appreciation and higher level of risk. There's more time to weather the inevitable ups and downs that come with higher risk investments.

Your Risk Tolerance

How do you feel about risk? Some investments fluctuate more dramatically in value than others but may have the potential for higher returns. It's important that you select investments that fit within your level of risk tolerance. If you are seeking lower risk investments one of our more secure and stable investment opportunities may be best for you.

Please circle your answers:

I plan to begin withdrawing principal from these investments in:

- A. Less than 3 years
- B. 3–5 years
- C. 6–10 years
- D. 11 years or more

After withdrawing the principal from these investments, I plan to spend all the funds in:

- A. Less than 2 years
- B. 2–5 years
- C. 6–10 years
- D. 11 years or more

Investor Profile Questionnaire

I would describe my general knowledge of investments as:

- A. None
- B. Limited
- C. Good
- D. Extensive

Circle all investments you currently own or have owned in the past.

- A. Money market funds or cash investments
- B. Bonds and/or bond funds
- C. Stocks and/or stock funds
- D. International securities and/or international funds

When investing I am mostly concerned with:

- A. Income
- B. Appreciation

When I invest this money, I am:

- A. Most concerned about my investment losing value
- B. Equally concerned about investment losing or gaining value
- C. Most concerned about my investment gaining value

Consider this scenario:

Imagine that in the past three months, the overall stock market lost 35% of its value. An individual stock investment you own also lost 35% of its value.

What would you do?

- A. Sell all of my shares
- B. Sell some of my shares
- C. Do nothing
- D. Buy more shares

Investor Profile Questionnaire

Answer the questions below and total your score at the bottom.

STRONGLY AGREE AGREE NEUTRAL DISAGREE STRONGLY DISAGREE SCORE

80–100% 60–80% 40–60% 20–40% 20% or less

1 The investment I am now considering represents the following percentage of my total investment portfolio:

1 2 3 4 5

1 year 2–5 years 6–10 years 11–20 years 21+ years

2 In how many years do you expect to start spending the principle you're investing today?

1 2 3 4 5

3 I do not foresee any major expenses that might cause me to make withdrawals from this investment before the minimum commitment period expires.

5 4 3 2 1

4 When I start making withdrawals from this investment, they will be used to fund my living expenses.

1 2 3 4 5

5 When it comes to investing, protecting the money I have is my highest priority above income or growth.

1 2 3 4 5

6 I always choose investments with the highest possible return.

5 4 3 2 1

7 I prefer an investment strategy designed to grow steadily and avoid sharp ups and downs.

1 2 3 4 5

8 To meet my financial goals, my investments must grow at a high rate of return.

5 4 3 2 1

9 The income I make from this investment will be a material amount of the income I use for day to day living expenses.

1 2 3 4 5

10 I prefer investments that are low risk, even if returns are lower than the rate of inflation.

1 2 3 4 5

SCORE TOTAL

Scoring: | 10–19 | 20–26 | 27–33 | 34–40 | 41–50

Corresponding Risk: **Low** **Low/Med** **Medium** **Med/High** **High**

The information provided in this worksheet should not be considered investment advice. You should consult your qualified financial professional to discuss your individual financial situation.