



Common Good Finance Project

Creating common good banks™, economics by the people

Society to Benefit Everyone
P.O. Box 21, Ashfield, MA 01330
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Prospective Investor Questionnaire

(This questionnaire is not an offer to sell shares and does not obligate the prospective investor in any way.)

Your Name

Address

Phone

City, State

Zip

Email

1. Investor Type. Only "sophisticated investors" may participate in any common good bank™ private offerings. You must be able to check at least one of the following, in order to qualify as a sophisticated investor under the Securities Act:

- My individual net worth, or joint net worth with my spouse, is over \$1 million (including my principal residence).
- In each of the past two years, my income was above \$200,000 or my joint income with my spouse was above \$300,000 and I have a reasonable expectation of the same income level in the current year.
- I have enough knowledge and experience in finance and business matters to evaluate the risks and merits of any investment I might contemplate and I can easily bear the economic risk of any investment I might make in a common good bank™ startup.

2. Financial Assets. What is your net worth, alone or with your spouse, NOT including your principal residence and its furnishings: (circle the approximate amount or range)

\$0 – \$50,000 – \$100,000 – \$200,000 – \$500,000 – \$1 million – \$2 million – \$5 million – \$10 million +

3. Experience.

- a. Have you ever invested (or do you currently invest) in private funds? YES NO
- b. About how many? _____
- c. What percentage of your total portfolio is in private funds (approximately)? _____%
- d. What types of private funds have you invested in?
 - Hedge Funds
 - Private Equity Investments
 - Real Estate
 - Startup Ventures
 - Other: _____

Signed,

Date