**INVESTOR NEEDS ANALYSIS (MULTIFAMILY)**

**Principal’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Property Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Company Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Company Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Principal’s Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PERSON:**

1. What made you want to invest in apartments?

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1. How long have you been investing?

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1. What part of the process do you enjoy the most?

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1. What part of the process do you enjoy the least?

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1. Do you have any hobbies outside of investing?

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1. Do you have any other investments other than apartments, real estate or otherwise?

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**ORGANIZATION (PROPERTY):**

1. How many multifamily properties does your company own?

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1. What is the companies mission statement?

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1. Do you manage your own properties? \_\_\_\_\_\_\_ Yes \_\_\_\_\_\_\_ No
2. Why do you manage your own properties?

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1. Why do you hire other management firms to manage your properties?

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1. How many partners are in the company?

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1. Does everyone have management control or are some limited partners?

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1. How does the relationship with all the partners affect business decisions?

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1. What is your acquisition strategy?

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**GOALS:**

1. What is the ultimate goal for your company?

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1. What is your target metric for investing in apartments? – IRR/Cash Flow/Capital Acc

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**OBSTACLES:**

1. What has been your biggest challenges?

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1. Do you think there are any limitations preventing you from meeting your investment goals?

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1. How do you feel the local market is doing?

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1. Do you see the local market as a limitation or an opportunity?

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1. Are you working with any other Brokers in this market? \_\_\_\_\_ Yes \_\_\_\_\_ No
2. ?

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