

**FORWARD COMMUNITY INVESTMENTS, INC.
INVESTOR APPLICATION**

*Please complete and return to Forward Community Investments,
211 S. Paterson Street, Suite 160, Madison, WI 53703*

PART I – GENERAL INFORMATION

Investor (please check one): Individual Entity

Investor is domiciled/incorporated in Wisconsin (please check one): Yes No

_____ Name (First, MI, Last or Name of Entity)	_____ Social Security No. or Tax ID No.
_____ Address	_____ Daytime Telephone No.
_____ City State Zip Code	_____ Email
_____ If an Entity, Type of Entity (partnership, corporation, trust)	_____ If an Entity, Jurisdiction of Formation of Incorporation

Joint Investor (if applicable)

_____ Name (First, MI, Last or Name of Entity)	_____ Social Security No. or Tax ID No.
_____ Address (Complete only if different from above)	_____ Daytime Telephone No.
_____ City State Zip Code	_____ Email

PART II – PROPOSED TERMS OF INVESTMENT

Principal Amount <i>Must be at least \$1,000*</i>	\$ _____
Term <i>Preferred minimum is 3 years</i>	<input type="checkbox"/> 3 years <input type="checkbox"/> 5 years <input type="checkbox"/> 10 years <input type="checkbox"/> Other ___ years
Interest Rate <i>Must be 0% to 3.0%</i>	_____ %
Frequency of Interest Payment <i>Please check one</i>	<input type="checkbox"/> Semi-annually on June 1 and December 1 <input type="checkbox"/> Annually on December 1 <input type="checkbox"/> Non-compounded interest held until maturity of loan
Interest Payments <i>Please check one</i>	<input type="checkbox"/> Send interest payments to the address listed in Part I, General Information <input type="checkbox"/> Send interest payments to address listed in Part II (below)

** NOTE: If you are not domiciled in Wisconsin, the minimum investment is \$5,000.*

PART V – FOR ENTITIES: ACCREDITED INVESTOR QUALIFICATION

NOTE: We do NOT need this information for Wisconsin-based investors. If you are domiciled/incorporated in Wisconsin and prefer not to complete this section, please disregard. Entity investors must fall into one of the following categories to be an “accredited investor.” Please indicate which category best describes your entity:

- A bank, insurance company, registered investment company, business development company, or a small business investment company
- An employee benefit plan, within the meaning of the Employee Retirement Income Security Act, if a bank, insurance company, or registered investment adviser makes the investment decisions, or if the plan has total assets in excess of \$5 million
- A charitable organization, corporation, or partnership with assets exceeding \$5 million
- A business in which all the equity owners are accredited investors
- A trust with assets in excess of \$5 million, not formed to acquire the securities offered, whose purchases are made by a sophisticated person
- None of the above.** *If you are not qualified under any of these standards, please contact Forward Community Investments and we will work with you to establish eligibility through other exemptions.*

PART VI: AUTHORIZATION TO PUBLISH NAME OR ANONYMITY PREFERENCE

I/we understand that the endorsement of Forward Community Investments by lenders is extremely helpful to Forward Community Investments in attracting other interested people to become lenders or contributors. This endorsement establishes credibility and represents the broad community support necessary for Forward Community Investment’s effectiveness. The amount and details of the loan will not be disclosed, nor will your mailing address; only the name, as indicated below will be used.

- I/we authorize Forward Community Investments to use my/our name and community as a lender to Forward Community Investments as follows:

- Please keep my/our status as a lender to Forward Community Investments confidential.

PART VII: SIGNATURE

By signing below, the undersigned agrees to the terms set forth above and agrees to notify Forward Community Investments if any of the information provided on this form changes.

Authorized Signature

Date

Print Authorized Signatory’s Name

Name of Entity, if applicable

Signature of Joint Investor, if applicable

Date

Print Joint Investor’s Name