



EP Investment Club Application

**Personal Information**

Name: \_\_\_\_\_ SSN# \_\_\_\_ -- \_\_\_\_ -- \_\_\_\_\_  
Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_  
Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Job Title: \_\_\_\_\_ Employer: \_\_\_\_\_

**Club Participation and Requirements**

Are you willing to share in the responsibility of club matters by taking a position on the board and/or club administration?  Yes  No

Are you willing to share in the responsibility of managing our portfolio by following at least one company?  Yes  No

Please check any special talents you possess that may contribute to the club (check all that apply):

- Public Speaking  Educator  Web Design  Accounting  Other

(If other, please specify): \_\_\_\_\_

Do you understand and agree with our long-term, buy and hold investment strategy:  Yes  No

Do you understand and agree with our Mission Statement?  Yes  No

Do you understand and agree with the Club Bylaws?  Yes  No

Do you understand and agree with the Partnership Agreement?  Yes  No

Do you agree to attend and participate in a vast majority of club meetings?  Yes  No

Will you be financially able to contribute the required minimum dues/fees in a timely manner?  Yes  No

Do you have at least 4 hours per month to spend on club activities (meetings, research, reading, administration, etc.)?  Yes  No

Are you willing to go along with a club majority vote, even if you voted against it?  Yes  No

If someone yelled fire in a crowded theatre and no signs of fire are present, would you look to move to a better seat?  Yes  No