

PACIFIC INVESTORS INVESTMENT CLUB

15417 60th Place West, Edmonds, WA 98026 • 206-694-2528 • 800-755-7030 • Fax:206-694-2542

Our Goal and Mission Statement is to: *"Double Our Money in Five Years"*

HOW may I attend breakfast or lunch with some PI Senior Partners, to learn more about PI, BEFORE JOINING?

Please call our Managing Partner, Bruce Ellis, at 206-694-2528, with your name, email address, and Cellphone. He will send you an invitation to our next get together. **Please read the Pacific Investors Fact Sheet® and Partnership Agreement** beforehand. They are both on our web site at: www.PACIFICINVESTORS.net. **Partners endeavor to present at least one proposed new partner within three years and strive to reach an account balance of \$250,000 within 15 years. Capital X time X return = results. PI can help you with the returns.**

APPLICATION: 09/15/18 Please Print

Date of birth

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Please enclose your fee to join, it covers your nine books and your \$15 application fee. It totals \$245. _____. Make that check payable to Bruce Ellis. Payments for investments should only be payable to Pacific Investors.

We only have one type of account to offer you. The ever-popular individual account.

Are you a US citizen? ____ Yes ____ No

Have you read the Pacific Investors Fact Sheet® and our Partnership Agreement? ____ Yes ____ No

Do you agree with our Pacific Investors investment policy? ____ Yes ____ No

Are you willing to **vote monthly**, by proxy, if necessary, on all our investment decisions? ____ Yes ____ No

Will you **attend our monthly meetings, 3 workshops** a year, and monthly **Team Meetings**? ____ Yes ____ No

Will the **time, day or location** of our meetings interfere with any other commitments you have? ____ Yes ____ No

Will you post **your monthly homework** into your folder on our **partnership Web site**? ____ Yes ____ No

Our three-day **Annual Retreats** are usually **the 2nd weekend of April**; will you attend them? ____ Yes ____ No

Do you plan to complete our Curriculum Plan and become a **CPI, Certified Pacific Investor®**? ____ Yes ____ No

Are you interested in becoming an officer, ____ now or ____ sometime in the future? ____ Yes ____ No

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

Can you handle **stock market declines** that result in a **loss to our portfolio, and to yourself**? ____ Yes ____ No

Have you read our **Partner Responsibilities**? ____ Yes ____ No. Will you be able to meet them? ____ Yes ____ No

How long, for how many years, do you plan to be a Pacific Investors partner? _____

Have you been, or are you now, a member of an investment club? ____ Yes ____ No

Have you, or are you currently, investing in the stock market? ____ Yes ____ No For how long? _____

Are you financially able to, and will you, **add at least \$300 monthly** to your partner account? ____ Yes ____ No

How much will you transfer **monthly** from your bank to our PI account, for credit to you? \$ _____

On **which date** each month will you move your money from your bank account into PI? ____ 10th or ____ 20th of the month?

Do you **also** want to make a **lump sum investment, for example \$2,500**? ____ Yes ____ No \$ _____

Individual:

Last

First

Middle

Social Security number

Emergency Contact:

Last

First

Middle

Social Security number

ADDRESS (If a PO Box, list both Box & street address.)

Street

City

State

Zip Code

(Evening [home] phone number with area code.)

(Your Daytime [work] phone number.)

Your Cell Phone Number with area code.

(Your E-mail address if you have one.)

Emergency Contact Home phone

Emergency Contact Cell Phone Number.

Emergency (Evening [home] phone number)

Emergency (Daytime [work] phone number.)

Emergency Contact E-mail address if you have one.)

Your alternative Phone Number.

Emergency Contact alternative phone number.

Emergency Contact Phone Number with area code.

The greatest compliment you can give PI is a referral.