

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

_____ Date of birth

Please enclose your fee to join, it covers your nine books and your \$15 application fee. It totals \$223. _____. 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 first 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.