

Money Rules Contract

Asset: _____

Set Up: Get Your Money and Structures Ready

Source of funds (circle): Wealth Account

OPM (Other People's Money)

Bank Loan

Asset Restructure

Other

Entities (to use or structure): _____

Forecasting: _____

INITIAL WHEN COMPLETE: _____

Money Rules: Make Sure the Asset Meets Your Criteria & Objectives

ROI & Projected Goal: _____

Cash Flow: _____

Appreciation: _____

Active: _____

Passive: _____

INITIAL WHEN COMPLETE: _____

Due Diligence: Data, Discussion, Discovery, Diagnosis, Decision

1. Is the investment congruent with my Money Rules? (circle) Yes No _____

2. What is my exit strategy? _____

3. Is "Big Money" investing? _____

4. Who has oversight? Is the information public? _____

5. Are the economics of the offer sound? _____

6. Will the marketing plan or business plan deliver the economics? _____

7. Can the Leadership Team successfully execute the marketing or business plan? _____

I, _____, agree that I have completed this contract completely and honestly, and that they adhere to the Money Rules I have agreed upon as a guide for financial decision-making.

Signature: _____ Date: _____