

Real Estate Investing Strategy Profile

Use the following to define the profile characteristics of a specific real estate investing strategy.

Describe the Strategy (for example... Buy and Hold, Nomad™, House Hacking, Fix and Flip, BRRR/R, Wholesaling, Partnerships, etc.)

Real Estate Investing/Entrepreneurship

- Real Estate Investing
- Real Estate Entrepreneurship
- Other: _____

Money Required

Most Common

- No Money
- Reserves
- 3-5% Down Payment
- 5-15% Down Payment
- 15-25% Down Payment
- 100% Cash Purchase
- Money Partner
- No Down Payment
- Repairs
- Option Fee
- Marketing
- Other: _____

Unusual

- No Money
- Reserves
- 3-5% Down Payment
- 5-15% Down Payment
- 15-25% Down Payment
- 100% Cash Purchase
- Money Partner
- No Down Payment
- Repairs
- Option Fee
- Marketing
- Other: _____

Entry Financing

Financing you use when acquiring the property.

Most Common

- None
- Traditional Owner-Occupant Loans
- Private Mortgage Insurance
- Traditional Non-Owner-Occupant Loans
- Subject-To
- Owner Financing
- Wrap Financing
- Loan Assumption
- Rent-To-Own, LO, LP
- Agreement for Deed et al
- Cash
- Hard Money Loan
- Private Money Loan
- Transactional Funding
- Utilize Seller's Ownership
- Other: _____

Unusual

- None
- Traditional Owner-Occupant Loans
- Private Mortgage Insurance
- Traditional Non-Owner-Occupant Loans
- Subject-To
- Owner Financing
- Wrap Financing
- Loan Assumption
- Rent-To-Own, LO, LP
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- Hard Money Loan
- Private Money Loan
- Transactional Funding
- Utilize Seller's Ownership
- Other: _____

Credit Required

Most Common

- None
- Qualify for Investor Financing
- Qualify for Hard Money Loan
- Qualify for Owner-Occupant Financing
- Other: _____

Unusual

- None
- Qualify for Investor Financing
- Qualify for Hard Money Loan
- Qualify for Owner-Occupant Financing
- Other: _____

Exit Financing

Financing your buyers use when buying from you.

Most Common

- Never Sell
- Traditional Owner-Occupant Loans
- Private Mortgage Insurance
- Traditional Non-Owner-Occupant Loans
- Subject-To
- Owner Financing
- Wrap Financing
- Loan Assumption
- Rent-To-Own, LO, LP
- Agreement for Deed et al
- Cash
- Hard Money Loan
- Private Money Loan
- Transactional Funding
- Double Close
- Other: _____

Unusual

- Never Sell
- Traditional Owner-Occupant Loans
- Private Mortgage Insurance
- Traditional Non-Owner-Occupant Loans
- Subject-To
- Owner Financing
- Wrap Financing
- Loan Assumption
- Rent-To-Own, LO, LP
- Agreement for Deed et al
- Cash
- Hard Money Loan
- Private Money Loan
- Transactional Funding
- Double Close
- Other: _____

Skills Required

Most Common

- Find Deeply Discounted Deals
- Find Cash Flowing Deals
- Property Management
- Acquisition Financing
- Find Investor Buyers
- Raise Money
- Security Analysis
- Real Estate Brokerage
- Estimate Repairs
- Manage/Complete Repairs
- Find Retail Buyer
- Other: _____

Unusual

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- Property Management
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- Raise Money
- Security Analysis
- Real Estate Brokerage
- Estimate Repairs
- Manage/Complete Repairs
- Find Retail Buyer
- Other: _____

Stability

In general, real estate tends to be **Actively Stable**, however some strategies/choices are more active than others.

- Active Stability
- Passive Stability
- Very Active Stability
- Other: _____

Scalability

How easy/hard is it to scale this strategy into doing more/larger transactions with ever increasing profitability?

- Easy to Scale
- Moderate to Scale
- Difficult to Scale
- Other: _____

Risk

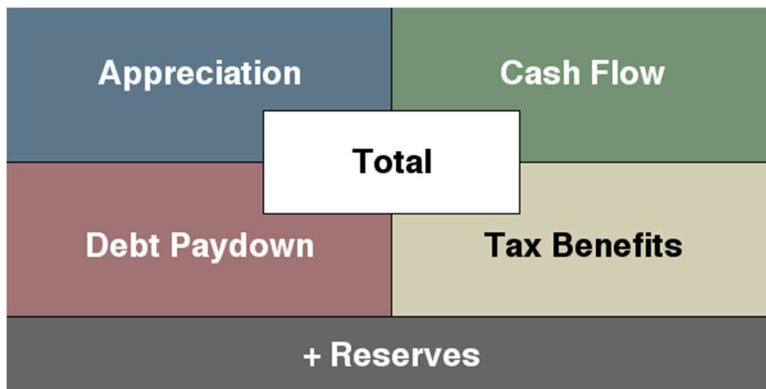
What risks are associated with this strategy?

- Price Decline During Rehab Risk
- Price Decline During Ownership Risk
- Strictly Limited Price Decline During Ownership Risk
- Rent Decline During Ownership Risk
- Unexpected Rehab Repairs Risk
- Rising Interest Rate After Purchase Risk
- Tenant-Buyer Unable to Qualify Risk
- Buyer Unable to Qualify Risk
- Tenant/Property Management Risks
- Marketing Money Risk
- Indirect Risks from Partnerships
- Indirect Risks from REITs
- Your Credit at Risk
- Your Reputation at Risk
- Other: _____

Profit Speed

How quickly do you make money? And, what size of money do you make at what interval?

- Cash Now. Approximate amount: _____
- Wealth Building. Write amounts below each term in *Return Quadrant*:™



- Other: _____

Entry Channels (Finding Deals)

Most Common

- Multiple Listing Service (MLS)
- For Sale By Owner (FSBO) – Actively Marketed
- For Sale By Owner (FSBO) – Hidden (Marketing/Networking)
- Wholesalers
- Tax Lien/Tax Deed/Tax Sales
- Auctions (Foreclosure, IRS and others)
- Stockbroker
- Syndicator
- REO
- Other: _____

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- Wholesalers
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- Auctions (Foreclosure, IRS and others)
- Stockbroker
- Syndicator
- REO
- Other: _____

Exit Channels (Selling Deals)

Most Common

- Hold
- Multiple Listing Service (MLS)
- For Sale By Owner (FSBO)
- Auction
- Stockbroker
- Syndicator
- Partner Buyout
- Option Expires
- Exercise Option
- Sell Option
- Sell/Assign Contract
- Other: _____

Unusual

- Hold
- Multiple Listing Service (MLS)
- For Sale By Owner (FSBO)
- Auction
- Stockbroker
- Syndicator
- Partner Buyout
- Option Expires
- Exercise Option
- Sell Option
- Sell/Assign Contract
- Other: _____

Market Conditions

What market conditions does this strategy require?

- Good Cash Flow
- Strong Appreciation
- Strong Rent Appreciation
- Value-Add Opportunities
- Short-Term Rentals Allowed
- Other: _____

Active or Passive

How much active work does this strategy require?

- Very Active
- Semi-Active
- Neutral
- Semi-Passive
- Very Passive
- Other: _____

Activity Type

What kind of work do you typically do?

- Actively Adding Value – While Vacant
- Actively Adding Value – While Owner-Occupied
- Active Income – Rent
- Active Income – Owner Financing
- Marketing
- Passive
- Other: _____

Holding Duration

How long are you typically in the deal?

- Just “Contract”
- Short-Term: < 1 Year
- Medium Term: 1-3 Years
- Long Term: 2 Years+
- Forever
- Other: _____

Direct Marketing To

What lists do you typically market to find these types of deals?

- Probate
- High Equity
- Low Equity
- Mortgage Delinquencies
- Geographic Farm
- Out of Area Owners
- Code Violations
- Other Liens
- Loan Interest Rate
- Other: _____

Best Market Conditions

What market conditions are best for this strategy?

- Good Cash Flow
- Strong Appreciation
- Strong Rent Appreciation
- Value-Add Opportunities
- Short-Term Rentals Allowed
- Other: _____

Retirement Account

Can you utilize this strategy inside your retirement account?

- Yes
- No
- Other: _____

Deal Accessibility

How easy is it to find these types of deals?

- Very Easy
- Easy
- Moderate
- Hard
- Very Hard
- Other: _____

Deal Availability

How plentiful are these types of deals?

- Extremely Rare
- Rare
- Some
- Common
- Extremely Common
- Other: _____