



CASHFLOW TOOLKIT

**The Ultimate 12 Week Program To Create
Savvy Real Estate Investors**

COACHING COURSE AGENDA

Week 1: Introduction to the Course

- Introduction and Expectations
- Review of Pre Course Assignments
- Accountability Overview and Use of the Coaching System
- Implementation of Accountability Tracker Tool
- Focus of Time & Energy

Week 2: Mindset Shift

- Debt Concepts Mastery
- Overcoming Obstacles
- Don't Work for Money / Pay yourself first
- Defining Your True "Why"
- Pain and pleasure points, embrace and overcome

Week 3: Real Estate Tools

- 10bii Calculator and Investment Math
- Income Verification Tools and Techniques
- Online Opportunity Sourcing
- Property Evaluator System / Financial Analysis Spreadsheets
- Underwriting Rules and NOI Calculations, Interpretations.

Week 4: Marketplace Analysis Concepts / Investor Identity

- Part 1: Marketplace Analysis Concepts
- Part 2: Investor Identity Discovery
- Asset Class Discovery - Features and Benefits of Each/Pros and Cons/Risks
 - ❖ Mobile Homes in Parks
 - ❖ Mobile Homes on Land
 - ❖ Single Family Homes
 - ❖ Multi-family
 - ❖ Gas Station
 - ❖ Shopping Centers
 - ❖ Office Space
 - ❖ Industrial
 - ❖ Laundromats
 - ❖ Cell Towers
 - ❖ Raw land
 - ❖ Notes

- Where to start- small, big, focusing on one class vs. shiny object
- Exit strategies (begin with the end in mind)
 - Wholesale
 - Fix and Flip
 - Buy and Hold

Week 5: Building a Powerhouse Investing Team

- ❖ Review asset class for each student
- ❖ Team Selection Process
 - Lawyers for Real Estate, SEC Compliance, Contract Law, Entity Structure, SDIRA Compliance
 - CPA / Bookkeeper / Tax Accountant / CFO
 - Property Management
 - Title Company
 - Lenders (Institutional / Hard Money)
 - Inspectors
 - Contractors (plumbers, electrical, framing, handyman, roofer, general contractor)
 - Insurance Agent
 - Real Estate Agent

Week 6: Growing your database / Increasing your network

- Social Media Marketing
- Social Media Planning and Execution Tools to create Know, Like and Trust
- In Person Networking Strategies to build your network

Week 7: Acquisition Strategies / Deal Structure

- The P. A. Q. Mastery
- Sourcing Opportunity - Analyzing "The numbers"
- Cash Purchase / Institutional Funding
- Lease Option / Lease Purchase
- Seller Carryback
- Subject To
- Land Trusts (Benefits and Operations)

Week 8: Negotiations

- Credibility - Positioning
- Types of Personalities -Institute For Advanced Studies
- 70/30 Rule on Listening
- Being a P.I.G.
- Overcoming Objections
- Introduction and Administration of the Offer Kit

Week 9: Role Play

- Review of homework assignments
- Strategy Discovery and Implementation
- Practice Negotiations

Week 10: Introduction to Basic Private Capital Strategies

- IRA Lenders
- Non-Accredited Investors,
- Accredited Investors
- Private Lenders
- Syndication; Reg D, 506 C and D
- Crowdfunding
- Hedge Funds

Week 11: The transaction - Getting to the closing table

- Offer Process, which forms to use and how to complete them
- Property Inspections - General, Home and Termite WDO, Roof, Electric, Foundation, 4-Point
- Asset Insurance (Property and Casualty)
- Title Insurance - ALTA Review and Problem Solving
- Renter's Insurance, Why it is critical that you require it.
- Overcoming common closing delays - repairs, title issues, lender delays, appraisal issues

Week 12: Asset Management

- Managing the managers
- Establishing systems
- Establishing infrastructure, bank accounts, vendors
- Leases
- Maximizing Revenue
- Rehab cost cutting measures / strategies
- Value add amenities to increase revenue