

# STRATEGY WORKSHEET

NAME 1: \_\_\_\_\_

NAME 2: \_\_\_\_\_

PHONE: \_\_\_\_\_

PHONE: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

## **SEASON OF LIFE -**

What SEASON OF LIFE are you in?

Accumulation:

Retirement:

Distribution:

## **TIMEFRAME UNTIL SHIFT / CHANGE -**

When do you plan to retire?

# of years: \_\_\_\_\_ (Approximate Year)

What event do you plan to cash out your investments for?

**REASON**

**DATE (Approximate Year)**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **PRIORITIES (CF or EP) -**

What are your PRIORITIES?

Build Wealth

in Short Term

over Long Term

Cash Flow

in Short Term

over Long Term

**INVESTOR LIFE CYCLE STAGE -**

What INVESTOR LIFE CYCLE stage are you in?

- Accumulation  Acquiring property
- Restructure for Growth  Leverage equity in a property to buy more
- Restructure for Efficiency  Change properties to save time and other expenses
- Retirement  Adjust to income needs
- Transition  Where is it going next

**RISK PROFILE -**

What is your Risk Profile?

- Aggressive
- Conservative

**MONEY TO INVEST -**

How much money to start? \$ \_\_\_\_\_

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**GETTING A LOAN -**

What is your credit score? \_\_\_\_\_

How easy will it be to get a loan? (1 being very unstable, 10 being rock solid)

1-10 Scale: \_\_\_\_\_

How much money do you expect to use for a down payment?

20%-50%: \_\_\_\_\_

Amount \$: \_\_\_\_\_

**NUMBER OF PROPERTIES & UNITS -**

How many properties do you want? # of Properties: \_\_\_\_\_

How many units do you want? More  Less

**TYPE OF PROPERTY -**

What type of investment properties do you want?

SFR (Homes)

Condo

Duplex

Fourplex

**RESERVES -**

How long will it take to replenish \$10,000 of reserves?

# of Months: \_\_\_\_\_

Where would the money come from?

Excess Earned Income

Other Investments or Cash

Cash Flow from the Property

If you have other income you can use to replenish reserves?

\$ Monthly: \_\_\_\_\_

How secure is your work? (1 being very unstable, 10 being rock solid)

1-10 Scale: \_\_\_\_\_

How stable is your income? (1 being very unstable, 10 being rock solid)

1-10 Scale: \_\_\_\_\_

**CONTINUE INVESTING -**

Will you use additional funds to continue building over time?

Continue Building:

1 time only:

Strategy for continued investing: \_\_\_\_\_