



Investment Property Checklist

First Things First – here are some things to think about and items we will want to know from you to help you get started.

- What are your goals with the property?
- How long do you expect to own it?
- Have you owned investment real estate before?/How did that work out for you?
- How much cash do you have available for a down payment?
- What is the source of that cash?
- Do you plan to hire a property manager?
- Are you willing to buy a property that needs some up-front repairs and updating?
- Ideally, when would you like to get started?

First Things to Look For – when we consider a property, it makes good sense to first give it a thorough visual inspection. Here are the items to focus on:

- Roof: Does it look like it will need a replacement soon?
- Siding: Low maintenance brick or unmaintained wood siding?
- Flooring condition: In need of replacement or refinishing?
- Kitchen condition- what condition are the countertops, cabinets and floor in?

- Are the appliances in need of replacement?
- Do the bathrooms need of updating or repair?
- Mechanical: HVAC and electrical in need of service or replacement?

Once you have made an offer on a property and that offer is accepted, you will have the chance to hire a professional home inspector who will give you a detailed report on the property.

The Vital Signs – these are some important numbers that will be plugged into our analysis tool:

- Price
- Down Payment
- Property Tax Amount
- HOA Fees
- Projected Rental Income

Economic Drivers – we will provide you with our insight so that you can make a good decision about these important numbers:

- Yearly maintenance percentage
- Appreciation forecast as a yearly percentage
- Vacancy forecast as a yearly percentage

Analysis Outcome – our analysis tool will provide results for these numbers:

- Before Tax Cash Flow
- After Tax Cash Flow
- After Tax Yield
- Cap Rate
- Cash on Cash return