## THE INDIVIDUAL INVESTOR: A FOCUS ON DESIGNING FOR THE AFTER

## Real Estate Edition – Investor Assessment Checklist

What is my investment goal(s)?   How much money can you allocate to investments?   How am I paying for this?   ○ No money down?   ○ Cash?   ○ Credit?   How much time do I have to spend on this/these investment(s) – initially and ongoing?   How am I buying this?   ○ Alone?   ○ With a small group that I know?   ○ With a small group that I know?   ○ With a large group?   What areas am I familiar with AND have access to?   ○ Region?   ○ State?   ○ Directly (me)?   ○ Via proxy (family member or property manager)?   What type of real estate type do I want?   ○ Commercial (business office)   ○ Commercial (business office)   ○ Commercial (business office)   ○ Commercial (business office)   ○ Residential multifamily – Large (5+)   ○ Residential multifamily – Small (2-4)   ○ Industrial land (farm, oil fields)   What type of project type do I want?   ○ Micro-flip (cosmetic upgrades only)   ○ Flip (major build or upgrades)   ○ Buy and hold (rentals, land lease)   Do I have a team in place now?   ○ Agent   ○ Banker   ○ Contractor/Handyman?   ○ Inspector?   New Investors/Investments   Am I emotionally attached to my property(s)?   Where are the good rental markets?   Am I comfortable with the area?   What is the properties proximity to major industry (companies/jobs, culture/night life, schools, etc.)?   Can I tvisit it several times, at different times?   Are there any anchor companies nearby (Starbucks, Wholefoods, Trader Joe's, etc.)?	Investn	nt Thesis
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	Am I prepared for dips in rent or extended vacancies?	
	Do I understand changes to local landlord/tenant laws for my properties?	
	Is my property a landlord state or a tenant state and what does that mean to my portfolio?	
	How am I communicating with my tenants?	
	Is taking Section-8 an option for me in the short or long term?	
	Am I over leveraged? (*see Stock Market Checklist for personal finance assessment)	
	Do I have a cushion?	
COVID-19 Considerations for Buyers		
	What are the COVID-19 safety rules for my area?	
	Am I comfortable with virtual tours?	
	Is flipping better for me in the short term, during and coming out of this crisis?	
	Should I consider smaller projects in the short term?	
COVID-19 Considerations for Sellers		
	Do I have tech safety updates that will better position my property (filtration systems, etc.)?	
	What will my situation be over the next 1-2 years?	
П	Where am I in relation to retirement?	
П	Am I supporting children and/or parents?	
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Most importantly, don't stress about "being imperfect". You'll learn with each piece of property.



