

REC� Investor Success Workbook

This workbook guides you through proven strategies and exercises to replicate successful investment outcomes.

Section 1: Portfolio Snapshot

- ☐ List all properties with purchase date, cost basis, and current market value
- ☐ Calculate current cash flow and net operating income for each asset
- ☐ Identify target ROI for each property

Section 2: Market Analysis Exercise

- ☐ Research local rental demand and price trends
- ☐ Analyze comparable sales data for potential acquisitions
- ☐ Map out emerging neighborhoods with high-growth potential

Section 3: Value-Add Opportunity Worksheet

- ☐ Property improvements checklist with estimated ROI impact
- ☐ Timeline planning for renovations and tenant turnover
- ☐ Budget allocation matrix for upgrades

Section 4: 1031 Exchange Planning

- ☐ Timeline template for exchange compliance
- ☐ Qualified intermediary contact list
- ☐ Replacement property identification criteria

Section 5: Exit Strategy Planning

- ☐ Determine hold period goals for each asset
- ☐ Scenario analysis: sell vs refinance vs exchange
- ☐ Timeline and tax implication assessment

Section 6: Performance Review

- ☐ Quarterly review template for key metrics
- ☐ Lessons learned and strategic adjustments log
- ☐ Next steps action plan

Download this workbook and use it alongside RECN's concierge services to drive your investment success.