



Doing Your 1st Multifamily Syndication

DISCLAIMER

I'm not an attorney nor a CPA and I do not play one on TV, or pretend to be one, in real or imaginary life. This material is for educational purposes **ONLY and should not be considered advise. Consult your own attorney and/or CPA for such advise...**



What We're Going To Do Today

- ✓ **Who Is Our Ideal Prospect (Avatar)**
 - ✓ **What Is An Avatar**
 - ✓ **Who Is Your Avatar**
 - ✓ **Speak Your Avatar's Language**
 - ✓ **Where Is Your Avatar**
 - ✓ **Your Value Proposition**



What We're Going To Do Today

MARKETING

- ✓ **Reaching Out To Our Ideal Prospect (Prospecting)**
 - ✓ **LinkedIn**
 - ✓ **Facebook**
 - ✓ **Networking**
 - ✓ **Email**



What We're Going To Do Today

- ✓ **Attracting Our Ideal Prospect (Presence Building)**
 - ✓ **Facebook Groups**
 - ✓ **Provide Value**
 - ✓ **Blog/Vlog/Podcast**
 - ✓ **Articles**



What We're Going To Do Today

- ✓ **Doing Business With Our Ideal Prospect (Strategic Partnering)**
 - ✓ **Roles Of A Strategic Partner**
 - ✓ **What Role Do You Want**
 - ✓ **Fee Structure Of A Strategic Partner**
 - ✓ **What To Do With Your Fee**
 - ✓ **Becoming A Strategic Partner**
 - ✓ **Next Steps And Q&A**





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- ✓ **Multifamily Investor and Strategic Partner**
- ✓ **Certified CCIM Market Analysis Instructor**
- ✓ **FL CCIM VP of Education 2021-2022**
- ✓ **CCIM Technology Board 2021-2023**
- ✓ **CCIM Foundations Board 2021-2023**
- ✓ **Former Syndicator Now Strategic Partner**
- ✓ **Owned a Property Management Company**



**START BUILDING RELATIONSHIPS
NOW!**



Relationships

NOTHING IS MORE IMPORTANT



Relationships

- ✓ **Rule 506b Requires It**
- ✓ **Real Estate Is A Relationship Business**
- ✓ **Strong Communication Skills**
- ✓ **Some Sales Skills**
- ✓ **They Won't Invest With Someone They Don't Know
Like And Trust**



Who Is Our Ideal Prospect



AVATAR



What Is An Avatar



**An incarnation, embodiment, or
manifestation of a person or idea**



Who Is Your Avatar



Who Is Your Avatar

Your Ideal Prospect:

- ✓ **Accredited And Sophisticated Investors (LP)**
 - ✓ **Vocation (Doctor, Attorney, Engineer...)**
 - ✓ **Hobbies (Exotic Cars, Boating, Aviation...)**
 - ✓ **SOI (Dentist, Doctor, Insurance Broker...)**
- ✓ **Friends and Family**
- ✓ **Social Media Following**



Who Is Your Avatar

Your Ideal Prospect:

- ✓ **Sponsors and Co-Sponsors (GP)**
 - ✓ **Family Office**
 - ✓ **Private Equity**
 - ✓ **Experienced Syndicators**
- ✓ **Can Bring The Equity And Experience**



Who Is Your Avatar

Your Ideal Prospect:

- ✓ **Key Principals (KP)**
 - ✓ **Family Office**
 - ✓ **Private Equity**
 - ✓ **Experienced Syndicators**
- ✓ **Can Bring The Ability To Provide Net Worth And Liquidity Requirement To Sign On The Loan**



Who Is Your Avatar

Your Ideal Prospect:

- ✓ **Strategic Partners (SP)**
 - ✓ **Real Estate Brokers**
 - ✓ **Appraisers**
 - ✓ **Lenders**
 - ✓ **CPAs**
 - ✓ **You**
- ✓ **Can Bring Experience Without Giving Up A Lot Of Equity**



Who Is Your Avatar

Identify Your Avatar (By Name):

- ✓ **Demographics**
 - ✓ **Age**
 - ✓ **Income**
 - ✓ **Education**
 - ✓ **Religion**
 - ✓ **Sex**



Who Is Your Avatar

Identify Your Avatar (By Name):

- ✓ **Psychographics**
 - ✓ **Net Worth**
 - ✓ **What They Spend Money On**
 - ✓ **Where They Travel**
 - ✓ **Hobbies**



Speak Your Avatar's Language



Speak Your Avatar's Language

PQR²

- ✓ What Are Their Problems/Pains
- ✓ What Questions Are They Asking
- ✓ What Roadblocks Are Stopping Them
- ✓ What Are The Results They Want To Achieve



Where Is Your Avatar



Where Is Your Avatar

- ✓ **Social Media Groups**
- ✓ **YouTube, Vimeo, Podcasts...**
- ✓ **Blogs and New Sources**
- ✓ **Trade Conferences**
- ✓ **Offline Social Circles (Philanthropic Clubs, Social Clubs, REI Clubs...)**



Your Value Proposition



Your Value Proposition

- ✓ **Identify Your Avatar (Investor, Sponsor, KP...)**
- ✓ **Use PQR²**
- ✓ **Keep It Succinct**
- ✓ **Use A Signature For Your Contact Information**
- ✓ **Create A Document With All You Value Propositions**



Your Value Proposition

Thank you for connecting... I've been in the multifamily industry for more than 9 years and I help investors find qualified multifamily operators by doing the due diligence and underwriting and help you vet the syndicator, so you are not alone.

I have been building strategic partnerships with the syndicators and sponsors which gives me the unique ability to connect you to a qualified opportunity and minimize your risk of not knowing the sponsor.

If you're not familiar with multifamily investments, they are an investment vehicle that gives you a monthly or quarterly dividend, a tax shelter, low volatility, is recession resistant, and produces higher returns than the stock market, by investing in tangible assets that grow in value through forced appreciation.

Are you available in the near future to discuss how this could be a win/win for both of us?

david@davidmonroeccim.com

multifamily.davidmonroeccim.com/calendar/

251-508-0010



MARKETING



PROSPECTING



LinkedIn



LinkedIn

- ✓ **Old Connections**
- ✓ **Making New Connections**
 - ✓ **Keyword Search Avatar**
 - ✓ **Send A Note**
 - ✓ **100 A Week**
- ✓ **GOAL** – **Get An Appointment With The Prospect**
- ✓ **After Connection Is Made**
 - ✓ **Send Value Proposition – Include Signature**



LinkedIn

Connection Note:

I'm an investor looking to build relationships with like-minded investors and believe a connection could be beneficial to both of us.



LinkedIn

Value Proposition:

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If you're not familiar with multifamily investments, they are an investment vehicle that gives you a monthly or quarterly dividend, a tax shelter, low volatility, is recession resistant, and produces higher returns than the stock market, by investing in tangible assets that grow in value through forced appreciation.

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LinkedIn

- ✓ **Signature**
 - ✓ **Email**
 - ✓ **Calendar Link**
 - ✓ **Phone Number – Creates Trust**
- ✓ **Connect Calendar To CRM – Email Database**



LinkedIn

Signature:

david@davidmonroeccim.com

**[https://multifamily.davidmonroeccim.com/calendar/
251-508-0010](https://multifamily.davidmonroeccim.com/calendar/251-508-0010)**



LinkedIn

- ✓ **CRM's - Email**
 - ✓ **Kartra**
 - ✓ **Aweber**
 - ✓ **Get Response**
 - ✓ **Active Campaign**



LinkedIn

- ✓ **CRM's - CRE**
 - ✓ **RealNex**
 - ✓ **PipeDrive**
 - ✓ **Ascendix CRE**
 - ✓ **HubSpot**



Facebook



Facebook

- ✓ **Join Dozens Of Multifamily Related Groups**
- ✓ **Find Questions You Can Answer In The Groups**
- ✓ **Create Your Own Facebook Group**
- ✓ **Add Value To Your New Group**
- ✓ **Connect To Members Of Other Groups**
- ✓ **Invite New Connections To Your Group**
- ✓ **Facebook Allows 300 Invitations A Week**



Facebook

- ✓ **Create Webinar/Video/White Paper**
- ✓ **GOAL** – **Get FB Group members On Your Email List**
- ✓ **Post The Registration/Optin Page To Your Group**
 - ✓ **If Webinar – Create A Facebook Event**
 - ✓ **Invite Connections To Facebook Event**



Facebook

- ✓ **Send Value Proposition Via DM**
- ✓ **DM Connections Your Registration/Optin Page**
- ✓ **If They Unfriend You - No Biggie - Facebook Only**

Allows 5000 Friends



Networking



Networking

In-Person:

- ✓ **REI Meetups**
- ✓ **Trade Conferences**
- ✓ **Education Events (For The Network)**
- ✓ **Social And Other Clubs (Rotary, Yacht, Car...)**



Networking

Virtual:

- ✓ **Virtual Meetups**
- ✓ **Virtual Trade Conferences**
- ✓ **Virtual Education Events (For The Networking)**



Email List



Email List

- ✓ **Create Automated Follow-up Sequence For Optins**
 - ✓ **Relationship Building Campaign**
 - ✓ **Weekly/Monthly - 12 Months (Newsletters)**
- ✓ **Broadcast An Opportunity**
 - ✓ **Link To The Offering Registration**
 - ✓ **Link To The Webinar Registration**
 - ✓ **Link To Your Calendar For Questions**



Email List

- ✓ **Create Automation Rule (Tags) For Link Clicks**
- ✓ **Clicked On Webinar**
 - ✓ **Send Recording As Soon As Possible**
 - ✓ **Create Automated Follow-up Campaign**
 - ✓ **3 Emails At Most – Get Live Video Appointment**
 - ✓ **Time Sensitive To Offering**



BUILDING PRESENCE



Start A Facebook Group



Start A Facebook Group

- ✓ **Group Name**
- ✓ **Header Image**
- ✓ **Privacy And Rules**
- ✓ **Invite 50 Per Day**
- ✓ **Hold Contests To Generate Shared Invites**
- ✓ **Provide Tons Of Value**



Provide Value (Other's Facebook Groups)



Provide Value

- ✓ **Join Facebook Groups (Keeping Avatar In Mind)**
- ✓ **Find Questions You Can Answer (Connect To Likes)**
- ✓ **Ask Questions (Connect To Likes And Invite To Group)**
- ✓ **Share Videos, Podcasts, Blog Posts, And Articles**
- ✓ **Provide Tons Of Value**



Blog, YouTube, Podcast



Blog, YouTube, Podcast

- ✓ **Create A Blog (Share To Social Channels)**
- ✓ **Start A YouTube Channel (Share To Blog)**
- ✓ **Start A Podcast (Share To Blog, YouTube, And Podcast Host)**
- ✓ **Use Instagram To Showcase Images**
- ✓ **Use Twitter To Provide Quick Value**



Write Articles



Write Articles

- ✓ **Expertise**
- ✓ **Industry News**
- ✓ **Training and Advice**
- ✓ **Quick How-To's**
- ✓ **Your Story**
- ✓ **Your Journey**



Write Articles

Where To Post Articles:

- ✓ **Blog**
- ✓ **LinkedIn**
- ✓ **Reddit**
- ✓ **Facebook (Groups)**
- ✓ **Article Directories**



Now record the article on video software, such as Camtasia or Screen Flow, and now you have a YouTube Video and a Podcast episode that you can share as new content to your social media channels...



STRATEGIC PARTNERING



What Is A Strategic Partner



What Is A Strategic Partner

A company or organization that has an arrangement to work with or help another, so that it is easier for each one of them to achieve the things they want to achieve...



What Is A Strategic Partner

I'm looking to build strategic partnerships with active, established syndicators, sponsors, and key principals where I bring the value of understanding, calculating, and identifying emerging markets, finding off market opportunities, conducting market and feasibility analysis, expertise in due diligence and underwriting, and assisting in capital raising, WITHOUT taking a piece the GP, AND => I'm looking to invest passively in the deals.



Roles Of A Strategic Partner



Roles Of A Strategic Partner

- ✓ **Acquisition (Deal Flow)**
- ✓ **Underwriting**
- ✓ **Market & Feasibility Analysis**
- ✓ **Demand/Supply Analysis**
- ✓ **Capital Raising**
- ✓ **Project Management**
- ✓ **Boots-On-The-Ground**



Roles Of A Strategic Partner

- ✓ **Asset Manager**
- ✓ **Investor Relations**
- ✓ **Due Diligence Support**
- ✓ **Tax Savings Strategies (CPA)**
- ✓ **Legal Services (JD)**
- ✓ **Insurance Broker Services**
- ✓ **Mortgage Broker Services**
- ✓ **Real Estate Broker Services**



Roles Of A Strategic Partner

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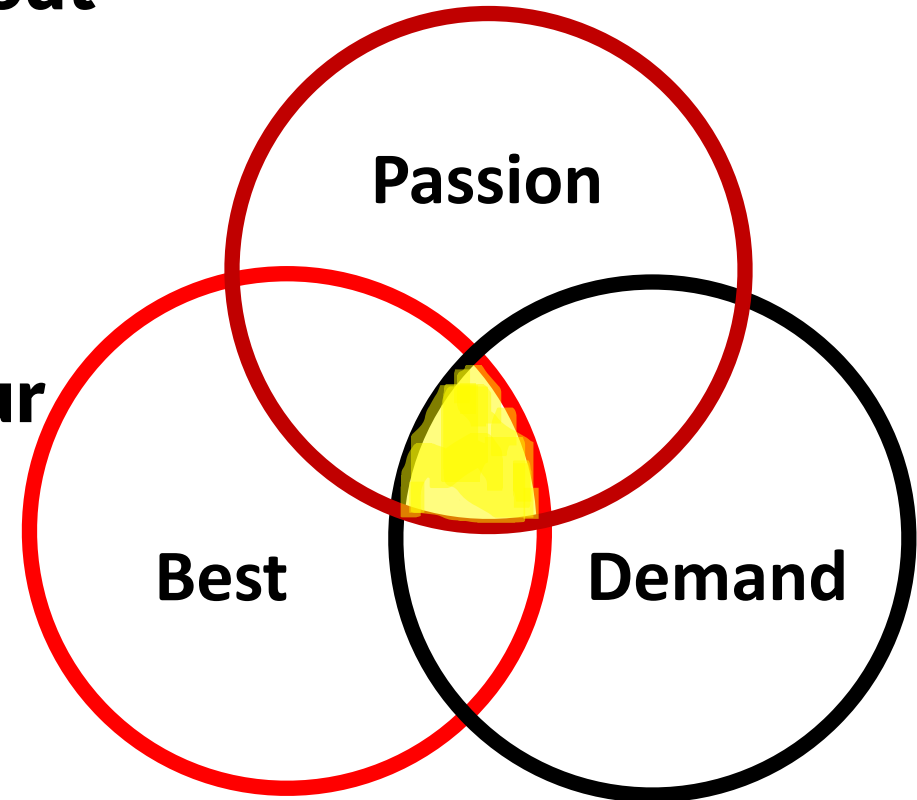


What Role Do You Want



What Role Do You Want

- ✓ **What Are You Passionate About**
- ✓ **What Are You The Best At**
- ✓ **Is There Demand For It**
- ✓ **Continuous Education On Your Passion**
- ✓ **Become Valuable**



What Role Do You Want

I'm looking to build strategic partnerships with active, established syndicators, sponsors, and key principals where I bring the value of understanding, calculating, and identifying **emerging markets**, finding **off market** opportunities, conducting market and feasibility analysis, expertise in due diligence and underwriting, and assisting in capital raising, **WITHOUT taking a piece the GP**, AND => I'm looking to **invest passively in the deals**.



Fee Structure Of A Strategic Partner



Fee Structure Of A Strategic Partner

- ✓ **Percentage Of GP**
- ✓ **Percentage Of Acquisition Fee**
- ✓ **Percentage Of Asset Management Fee**
- ✓ **Consulting Fee**
- ✓ **Loan Broker Fee**
- ✓ **Real Estate Broker Fee**
- ✓ **Insurance Broker Fee**



What Do You Do With Your Fee



What Do You Do With Your Fee

- ✓ **Depends On Your Goals**
 - ✓ **Cash Flow (Intermittent)**
 - ✓ **Wealth Building (Consistent)**
- ✓ **Take It To The House**
 - ✓ **Pay Tax Man The Most**
- ✓ **Reinvest Up To 80% Into The Deal**
 - ✓ **Pay Tax Man The Least**
 - ✓ **Save 20% For The Tax Man => J.I.C.**



Becoming A Strategic Partner



Becoming A Strategic Partner

- ✓ **Create Your Value Proposition**
- ✓ **Prospect On LinkedIn (Wherever Your Avatar Hangs Out)**
- ✓ **Build Your Presence On Facebook And Other Social Media**
- ✓ **Deliver Your Value Proposition**
- ✓ **Schedule Appointments**
- ✓ **Win Assignments**



Become A Strategic Partner

The Best And Fastest Way To Get
Connected To **Your Future Team**



Become A Strategic Partner

**While Still Utilizing Social Media To
Prospect And Build Your Presence Is...**



Become A Strategic Partner

Belong To A Network Of Like-Minded
People Working Towards Similar
Goals Of All Experience Levels



**What If You Had Someone
That Would HELP You
Find Partners And Investors**



**And Reduce The Time, Effort, And
Energy Of Doing It On Your Own**



And...

**You Had All The Tools Needed To
Help You Be Successful**



And...

**You Were Part Of A Private Community
Of GP's, KP's, LP's, And SP's**



And...

**You Could Attend A 12 Week Live
Workshop To Show You How To
Put A Syndication Together And **Find**
The Money And Partners To Get
Deals Done**



And...

**Get Access To A Course To Show You
How To Properly Identify An
Emerging Real Estate Market**



And...

**If That Wasn't Enough... How About
1-on-1 Coaching, **ANYTIME** You Need It**



And...

NO, It Doesn't Cost \$20K+



INTRODUCING...



— ★ ★ ★ —

STRATEGIC PARTNERING



**Here's A Detailed Breakdown
So, You **Understand** What's Included**



**You Will Spend The 1st Twelve Weeks
Immersed In A Live **Strategic Partnering
Workshop** Where You Will Learn...**



Strategic Partnering Workshop:

- ✓ **Module 1 - Understanding Syndications**
- ✓ **Module 2 - Building Relationships**
- ✓ **Module 3 - Finding Opportunities**
- ✓ **Module 4 - Underwriting - The Market**
- ✓ **Module 5 - Underwriting - The Deal**
- ✓ **Module 6 - Finding Partners And Investors**



Strategic Partnering Workshop:

- ✓ **Module 7 – The Offering Summary**
- ✓ **Module 8 – Negotiations And Contracts**
- ✓ **Module 9 – Due Diligence**
- ✓ **Module 10 – Close On The Deal**
- ✓ **Module 11 – Operations And Asset Management**
- ✓ **Module 12 – Exit The Opportunity**



The Next **Live Virtual Workshop Starts
On Thursday July 1, 2021**



There Will Be **Homework Between Each
Session To Keep You Moving Forward**



**In Week 4, Your Homework Will Be To
Complete The 4 Modules Of The
Strategic Analysis Workshop**



Strategic Analysis Workshop:

- ✓ **Module 1 – Current Multifamily Demand**
- ✓ **Module 2 – Current Economic Base**
- ✓ **Module 3 – Future Economic Base and Demand/Supply**
- ✓ **Module 4 – Market Cycles And Competitive Analysis**



You're Also Going To Get Access To **Strategic Partnering Labs**



Strategic Partnering Labs:

- ✓ **Property Management Documents**
- ✓ **Syndication Documents**
- ✓ **Project Management Documents**
- ✓ **Due Diligence Documents**
- ✓ **Marketing Documents**



Strategic Partnering Labs:

- ✓ **Underwriting Tools – Deal and Market**
- ✓ **Pitch Deck Templates (Offering Summary)**
- ✓ **Transaction Templates – LOI**
- ✓ **Property And Contact Information In Your Markets**
- ✓ **Investor and Business Contacts**
- ✓ **Quarterly Planner And Production Tracker**



You'll Also Get **Training And Support On
Your Website To Generate Leads**



You're Going To Get Access To The Private Strategic Partnering Community



Strategic Partnering Community:

- ✓ **Build Relationships**
- ✓ **Find Potential Partners And Investors**
- ✓ **Ask Questions For Help**
- ✓ **List Opportunities**
- ✓ **Get Support For Underwriting**



This **Community Is In A
Private Facebook Group And
Has A Private **Slack Channel****



If That Wasn't Enough, I will Help You...



I Will Help You:

- ✓ **Underwrite Your Deals**
- ✓ **Structure Your Business And Deals**
- ✓ **Connect You To JV Partners**
- ✓ **Connect You To Sponsors**
- ✓ **Connect You To Key Principals**
- ✓ **Find Passive Investors**



**You Will Have The Ability To **Add Me As
A Strategic Partner** To Your Pitch Deck,
Marketing Materials, And Your Website**



**Every Wednesday Night We Have
Weekly Q&A And Networking**



**Every Monday Night We Have The
Goal Setting Workshop**



Why Stop There...



I Will Give You 1-On-1 Support
ANYTIME You Need It



All I Ask, You **Only Schedule One
Appointment At A Time**



**There Are Many Communities Charging
Over \$20K A Year For **Only Half** Of
What We Have In Strategic Partnering**



**Right Now... For The Launch Of
Strategic Partnering, I'm Offering
LIFETIME Access For...**



**ONLY \$1997 – One Time
FOR LIFE!**



OR...

**You Can Invest \$97 A Month And Stay In
The Community As Long As You Get
Value With No Long-Term Contract**



**Regardless Of Your Option, There's An
Unconditional, **NO QUESTIONS ASKED**,
30 Day Money Back Guarantee**



So, There Is Literally **Zero Risk**



- ✓ **Strategic Partnering Workshop - \$997**
- ✓ **Strategic Analysis Workshop - \$497**
- ✓ **Strategic Partnering Labs - \$9,997**
- ✓ **Strategic Partnering Community - \$1,997**
- ✓ **1-on-1 Mentoring And Coaching (ANYTIME) - \$9,997**

THAT'S \$23,485 IN REAL VALUE



For **ONLY** \$1997 With
LIFETIME Access

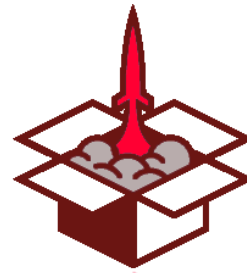


**OR => ONLY \$97 A Month Until
Cancelled With No Contract**



**AND Don't Forget The Unconditional,
NO QUESTIONS ASKED, 30 Day Money
Back Guarantee If You're Not Satisfied**





STRATEGIC PARTNERING

**If you want to be part of Strategic Partnering,
CLICK THE LINK BELOW to claim your access...**

\$1997 Lifetime:

<https://multifamily.davidmonroeccim.com/strategic-partnering-lifetime-1997>

\$97 A Month Until Cancelled:

<https://multifamily.davidmonroeccim.com/strategic-partnering-monthly>



Q&A