Accredited Investors Email Campaigns

# Lead Magnet Follow Up Sequence

**Email 1 – Your [Download/Video/Resource]**

{first\_name},
I personally wanted to take the time to thank you for [downloading/watching] [title of lead magnet].

[Download/Watch] Here

This resource was created to help you be more confident in your investment decisions, and I want you to know that you don’t have to be alone in this process.

Anytime you have questions or need help with a deal you’re considering, please do not hesitate to reach out to me by email at [your email address], text me at [your phone number], or schedule a 20-minute call on my calendar at [your calendar link].

[Your Name]
[Your Title]

**Email 2 – [Your Company Name] Multifamily Opportunities**

Good Morning {first\_name},
I truly hope you were able to get a lot of good nuggets and takeaways from the [download/video] I sent you in the last email.

At [your company name] we are consistently looking for multifamily opportunities where we can add value to the residents through improvements in their community and give our investors higher returns because of the value we create in our communities.

When we find opportunities where we can add value to a community, we will send you the information to see if it would fit in your investment strategy.

I will also be sending you information to help you; Underwrite deals, vet sponsors that invest your money for you, understand how your distributions should look before and after tax, and understand you’re not alone in this process…

[Your Name]
[Your Title]

**Email 3 – Underwriting Assumptions**

Good Morning {first\_name},
I hope you and your family are doing well. Have you invested in anything lately, if so I would love to hear about it.

One of the problems you may encounter when trying to vet the deal is the sponsor will not show you their raw underwriting model, and it can be frustrating because you don’t know if they’re trying to hide something. That’s OK!

Here’s why. There are 6 underwriting assumptions that will make or break a deal. So, if you know where they got the data for these 6 assumptions, you don’t need to see their confusing underwriting model, you can make your decision based on their answers.

Here are the 6 assumptions:

* What is the average market rents your projecting in your business plan, and how did you determine it?
* What are your vacancy assumptions for the first 5 years and where did you get your data?
* What is the income growth you’re projecting and where did you get the data?
* What is the expense growth you’re projecting and where did you get the data?
* What is your exit cap rate and is it based on current market cap rate or current purchase, or going in, cap rate?
* What is the operating expense ratio for each year of the business plan and at year of sale?

The answers from these 6 assumptions will save you from a bad investment if their answers don’t align with the current market and property data.

If you want my help in learning more about these assumptions and how you can get the data to test their answers, you can schedule a call with me at [your calendar link].

I hope this information is useful for you!

[Your Name]
[Your Title]

**Email 4 – Vetting Your Multifamily Sponsors**

Good Morning{first\_name},
The scariest part of investing your hard earned dollars with someone else that’s promising you a return is whether they can do, and have done, what they say.

There are a ton of questions that you can ask a sponsor in the vetting process, resources you can search, and of course doing a background check.

Because I know your time is valuable, I have compiled these questions and resources in one document, and you can download it below…

[Your resource download link]

Remember, you’re not alone in this process. Anytime you have questions or need help with a sponsor you’re considering, please do not hesitate to reach out to me by email at [your email address], text me at [your phone number], or schedule a 20-minute call on my calendar at [your calendar link].

[Your Name]
[Your Title]

**Email 5 – Return “On” vs Return “Of” Capital**

Good Morning{first\_name},
One of the tactics I see sponsors use to entice investors to invest with them, is how they treat returns to make it look like a good deal.

The most egregious example is the Average Annual Return, or AAR. Since they can’t get the cash-on-cash return high enough each year to attract you to the deal, they include the return from the sale of the property and say that your average cash on cash for the 5-year investment will be “X”.

This is a gross misrepresentation of cash-on-cash return, which is calculated from cashflow, before or after tax, from operations on an annual basis.

BUT => Because they can’t show you the average cash-on-cash return will be well below than what’s promised in the preferred return, the make it look good by including the return after the sale of the property.

The other thing I have seen is the investor put “X” in the deal and all the capital wasn’t used during the business plan, so they return the capital and calculate it as part of your annual cash-on-cash return for that year.

Their telling you it’s a return “on” investment, but all they’re doing is returning unused capital to you, which is a return “of” and should not be reflected in the final internal rate of return.

If you see this and you want help understanding what the offering is doing, please do not hesitate to reach out to me by email at [your email address], text me at [your phone number], or schedule a 20-minute call on my calendar at [your calendar link].

[Your Name]
[Your Title]

**Email 6 – Depreciation and Capital Gains**

Good Morning{first\_name},
Today, you’re being told that if you invest in a sponsors opportunity you won’t have to pay capital gain taxes because of a Government program called Bonus Depreciation.

In some cases that may be true. The IRS allows investment property owners to depreciate the improvements over 27.5 years from the acquisition date of the asset.

The Bonus Depreciation program allows the owner to take all the depreciation from the PERSONAL property built into the improvements in the first year. How this is done goes beyond the scope of this email, but you can contact to discuss the program.

At the sale of the property, to determine your capital gain burden follow the example below:

Basis at Acquisition (Purchase price plus costs)

+ Capital Additions (If raised after closing)

− Cost Recovery (Depreciation) Taken

− Basis in Partial Sales (Only applies to owner financing)

= Adjusted Basis at Sale

CALCULATION OF CAPITAL GAIN ON SALE:

Sale Price

− Costs of Sale

− Adjusted Basis at Sale (See above)

− Participation Payment on Sale (N/A in this example)

= Gain or (Loss)

− Straight Line Cost Recovery (Limited to Gain – Depreciation taken as shown above)

− Suspended Losses (Possibly from the bonus depreciation)

= Capital Gain From Appreciation

After that difficult calculation is completed, there’s a good chance there won’t be any capital gain remaining, which would then be taxed up to 20%.

Here’s what the sponsors aren’t telling you. That same bonus depreciation you took that may have eliminated the capital gain, now has to be recaptured and tax must be paid on it up to 25%.

Either way, the IRS is going to get paid from the sale of property.

Please check with your CPA to see how investing in an asset that’s going to use bonus depreciation will affect your tax structure, you may not even qualify to participate in depreciation, which is why you need to seek professional advise before investing.

As always, if you have any questions about your funds are treated on an after tax basis, please do not hesitate to reach out to me by email at [your email address], text me at [your phone number], or schedule a 20-minute call on my calendar at [your calendar link].

[Your Name]
[Your Title]

**Email 7 – Multifamily Investment Opportunity**

Good Morning{first\_name},
I truly hope you’re getting a lot of value from the emails I have been sending over that several [days/weeks].

Remember in the second email I said occasionally, I would send you information about a multifamily opportunity. Here’s me keeping that promise…

[Your company name] is putting together a fund that’s going to invest in multifamily properties in [List markets] and would like to give you the opportunity participate if the opportunity meets your investment goals.

We will be looking for multifamily properties that are:

* [Investment criteria 1]
* [Investment criteria 2]
* [Investment criteria 3]
* [Investment criteria 4]
* [Investment criteria 5]
* [Investment criteria 6]
* [Investment criteria 7]

Below is the investment summary for you review, which will include all the key details of the investment required and the projected returns.

[Download link for your summary]

We have also recorded a video about the investment opportunity, and we invite you take 20 minutes and learn more about this incredible opportunity.

[Link to video]

We truly hope you consider this offering and if you have any questions about the opportunity at all, please schedule a 20 minute call with me at [your calendar link].

[Your Name]
[Your Title]