



Multifamily Investing Strategies For Beginners

**A 3-Part Framework To Investing In
Your First Multifamily Deal**

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

Part 1 – THE BIG LIE

- ✓ **What Your Told**
- ✓ **The Truth**
 - ✓ **Look At The Numbers**
- ✓ **Then What?**
 - ✓ **JV Partnerships On Small Properties**
 - ✓ **Strategic Partnering**



What We're Going To Do Today

Part 2 – STRATEGIC PARTNERING

- ✓ **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**



What We're Going To Do Today

Part 3 - 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**
- ✓ **Becoming A Strategic Partner**
 - ✓ **Next Steps And Q&A**





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- ✓ **Certified CCIM Market Analysis Instructor**
- ✓ **CCIM Technology Board 2021-2023**
- ✓ **CCIM Foundations Board 2021-2023**
- ✓ **CCIM Ward Center Committee Co-Chair 2022**
- ✓ **Former Syndicator Now Strategic Partner**
- ✓ **Owned a Property Management Company**



Multifamily Investing Strategies

- ✓ **Buy And Hold Model**
- ✓ **Value Add Flip Model**
- ✓ **Master Lease Option Method**
- ✓ **Wholesale Method**
- ✓ **Bird Dog Method**
- ✓ **Strategic Partnering Method**



**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**



Part 1 - THE BIG LIE



What You're Told



What You're Told

- ✓ You'll 10X Your Cash Flow And Net Worth
- ✓ It's Just As Easy To Buy 100 Units As It Is To Buy 10 Units
- ✓ You'll Get An Acquisition Fee And Asset Management Fee
- ✓ You Won't Pay **ANY** Taxes



The Truth



The Truth

- ✓ **You'll Make More Cash Flow From A 10 Unit Then A 100 Unit**
- ✓ **Let's Look At The Numbers...**



The Truth

Scenario:

- ✓ **100 Unit Property for \$10,000,000**
- ✓ **30% Required Equity**
- ✓ **70/30 Investor Split**
- ✓ **8% Preferred Return**
- ✓ **10% Cash on Cash Return**
- ✓ **You Negotiate 10% Of The GP**



The Truth

- ✓ **Equity Required = \$3,000,000**
- ✓ **10% CoC Return = \$300,000**
- ✓ **8% Preferred Return To Investors = \$240,000**
- ✓ **70/30 Split Between LP/GP**
 - ✓ **70% To Investors = \$42,000**
 - ✓ **30% To Syndicators = \$18,000**
- ✓ **Your Annual Cash Flow = \$1,800**



IF THERE'S A 10% CoC RETURN



The Truth

Scenario:

- ✓ **10 Unit Property for \$500,000**
- ✓ **30% Required Equity**
- ✓ **2 Other Partners For \$100,000**
- ✓ **You Bring \$50,000 Because You Got 1% On The Other 100 Unit Deal As A Strategic Partner**
- ✓ **10% Cash on Cash Return**



The Truth

- ✓ **Equity Required = \$150,000**
- ✓ **10% CoC Return = \$15,000**
- ✓ **Your Annual Cash Flow = \$5,000**



The Truth

- ✓ You'll Make More Cash Flow From A 10 Unit Then A 100 Unit
 - ✓ Let's Look At The Numbers...
- ✓ You Will **NOT** 10X Your Cash Flow And Net Worth
- ✓ It's **NOT** As Easy To Buy 100 Units As It Is To Buy 10 Units
- ✓ You **MIGHT** Get An Acquisition Fee And Asset Management Fee
- ✓ You **WILL** Pay Taxes



Then What?



Then What?

- ✓ **FIRST** – Depends On You Goals
- ✓ **If You Have Money**
 - ✓ **JV With 1 to 3 Other JV Partners**
 - ✓ **Invest Passively In Syndications**
- ✓ **If You Don't Have Money**
 - ✓ **Wholesale Small Apartments**
 - ✓ **Be A Strategic Partner**



Part 2 – 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

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.

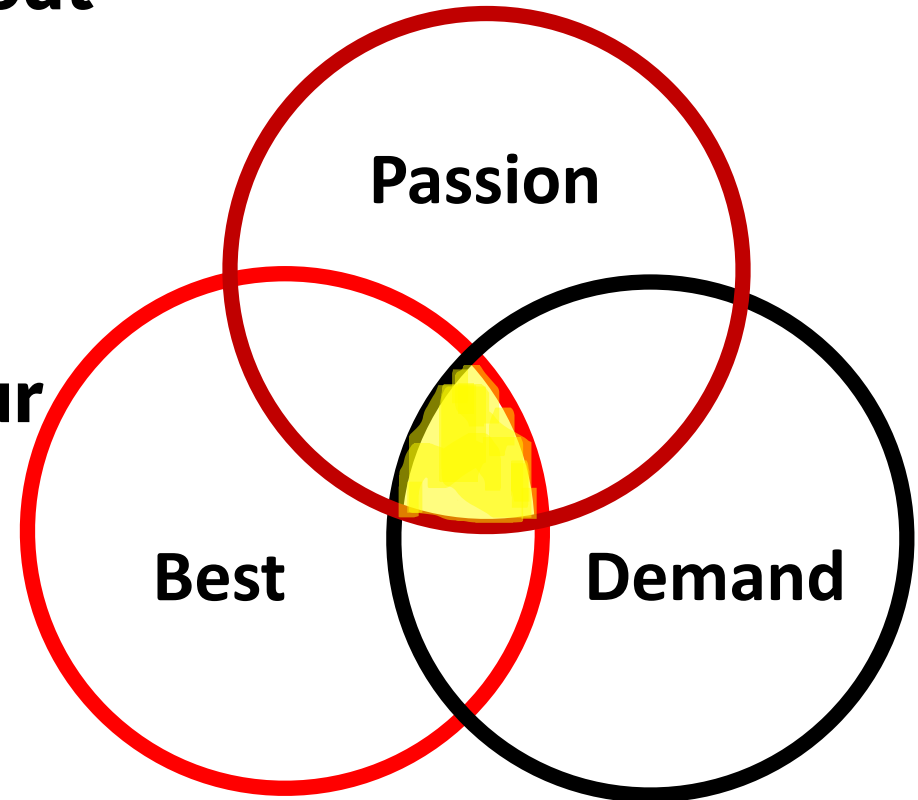


What Role Do You Want



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**
 - ✓ **Quick Cash (Intermittent)**
 - ✓ **Cash Flow (Consistent)**
 - ✓ **Wealth Building (Consistent)**
- ✓ **Take It To The House**
 - ✓ **Pay Tax Man The Most**
- ✓ **Reinvest Up To 80% Into The Deal Or A JV**
 - ✓ **Pay Tax Man The Least**



Part 3 – 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:

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?



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**



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)**
- ✓ **Be A Guest On Podcasts (Share To All Social Channels)**
- ✓ **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...



Become A Strategic Partner



Become 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 21 Week Live
Workshop To Show You How To
Be A Strategic Partner And
Find Partners To Get Deals Done**



And...

**If That Wasn't Enough...
How About Access To Me,
ANYTIME You Need It**



And...

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



INTRODUCING...



A Group **Mentoring** Network



Designed To **Help YOU** Invest In
Your 1st Or Next Multifamily Deal



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



You Will Get Access To The 14 Module
Strategic Partnering Workshop
Where You Will Learn...



Strategic Partnering Workshop:

- ✓ **Module 1 - Begin With The End In Mind**
- ✓ **Module 2 - The Big Lie (Strategic Partnering)**
- ✓ **Module 3 - Building Relationships**
- ✓ **Module 4 - Underwriting - The Market**
 - ✓ **Part 1 - Identify Your Market(s)**
 - ✓ **Part 2 - Current Economic Base**
 - ✓ **Part 3 - Future Economic Base And Demand/Supply Analysis**
 - ✓ **Part 4 - Competitive Advantage and Market Cycles**



Strategic Partnering Workshop:

- ✓ **Module 5 – Finding Opportunities**
- ✓ **Module 6- Underwriting The Deal**
 - ✓ **Part 1 – Underwriting Fundamentals And Definitions**
 - ✓ **Part 2 – Verifying Assumptions**
 - ✓ **Part 3 – Financial Analysis**
- ✓ **Module 7 – Negotiations And LOI**
- ✓ **Module 8 – Due Diligence**



Strategic Partnering Workshop:

- ✓ **Module 9 – Raising Capital**
 - ✓ **Part 1 – Understanding Syndications**
 - ✓ **Part 2 – Offering Summary**
- ✓ **Module 10 – Getting A Loan**
- ✓ **Module 11 – Property Management**
 - ✓ **Part 1 – Understanding Operations**
 - ✓ **Part 2 – Property Management Questionnaire**



Strategic Partnering Workshop:

- ✓ **Module 12 - Closing The Deal**
- ✓ **Module 13 - Asset Management**
- ✓ **Module 14 - Exit Strategy**



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



The Current **Live Class Started On
February 20th At 1pm EST**



The Multifamily Underwriting Case Study



**A LIVE Virtual Training Started
Tuesday February 22nd At 1pm East**



Underwriting Case Study:

- ✓ **Week 1 - Identify The Market**
- ✓ **Week 2 - Build Relationships With Brokers And Owners**
- ✓ **Week 3 - Identify Assumptions**
- ✓ **Week 4 - Underwrite The Deal**
- ✓ **Week 5 - Submit LOI**



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 Template (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 A **FREE Website
PLUS Training And Support To
Help You 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 Has A Private Slack Channel



Strategic Partnering 2.0



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



I Will Help You:

- ✓ **Underwrite Your Deals**
- ✓ **Pull Demand And Supply Data**
- ✓ **Connect You To JV Partners**
- ✓ **Connect You To Sponsors**
- ✓ **Connect You To Key Principals**
- ✓ **Find Passive Investors**



**You Will Have The Ability To Request
CoStar And STDB Reports For
Calculating Demand And Supply and
Underwriting Your Deals**



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



**Every Tuesday I Teach A
Module Of The
Underwriting Case Study**



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



Every Sunday I Teach A Module Of The **Strategic Partnering Workshop**



Why Stop There...



I Will Give You Support
ANYTIME You Need It



Personal Support:

- ✓ **Slack**
- ✓ **Social Media Direct Message**
- ✓ **Email**
- ✓ **Text**



**There Are Many Communities Charging
Over \$25K A Year For **Only Half** Of
What We Have In Strategic Partnering**



**BUT – I Wanted To Break Down The
Barrier Of Entry Into An Investing And
Mentoring Community Like This**



**Right Now... For The Participants Of This
Masterclass, I'm Offering The Strategic
Partnering Community **For LIFE...****



ONLY \$1,997



FOR LIFE!



BUT...

This Offer Is ONLY Good For 4 Days



Due To The Launch Of **Strategic Partnering 2.0**



**After Saturday At Midnight Eastern The
Price Will Be \$4,997**



AND... There's An Unconditional, **NO
QUESTIONS ASKED, 30 Day Money
Back Guarantee**



So, There Is Literally Zero Risk



AS A BONUS...



Your Business Partner/Spouse **(FREE)**



Let's Recap



- ✓ **Multifamily Underwriting Case Study - \$997**
- ✓ **Strategic Partnering Workshop - \$1,997**
- ✓ **Strategic Partnering Labs - \$9,997**
- ✓ **Strategic Partnering Community - \$9,997**
- ✓ **Personal Mentoring And Support - \$9,997**
- ✓ **Weekly Q&A And Goal Setting Workshops - \$4,997**
- ✓ **Your Business Partner/Spouse (FREE) - Priceless**

THAT'S \$37,982 IN REAL VALUE



FOR ONLY \$1,997



Due To The Launch Of **Strategic Partnering 2.0**



**After Saturday At Midnight Eastern The
Price Will Be \$4,997**



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



BRING YOUR PARTNER OR SPOUSE

FREE



ONLY For 4 Days





If you want to be part of the **Strategic Partnering** and get access for LIFE,
CLICK THE LINK BELOW to claim your access TONIGHT...

<https://multifamily.davidmonroeccim.com/lifetime-checkout-mfis>



Q&A