



# **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 - BUILDING RELATIONSHIPS

- ✓ **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

## Part 2 - 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

## Part 3 – 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**
  - ✓ **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**



# 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**



# 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**
  - ✓ **Lifestyles**



# Speak Your Avatar's Language



# Speak Your Avatar's Language

## PQR<sup>2</sup>

- ✓ 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 PQR<sup>2</sup>**
- ✓ **Keep It Succinct**
- ✓ **Use A Signature For Your Contact Information**
- ✓ **Create A Document With All Your 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?

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[multifamily.davidmonroeccim.com/calendar/](https://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:

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.

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# LinkedIn

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



# LinkedIn

**Signature:**

**[david@davidmonroeccim.com](mailto: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)**
- ✓ **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...**



# 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.

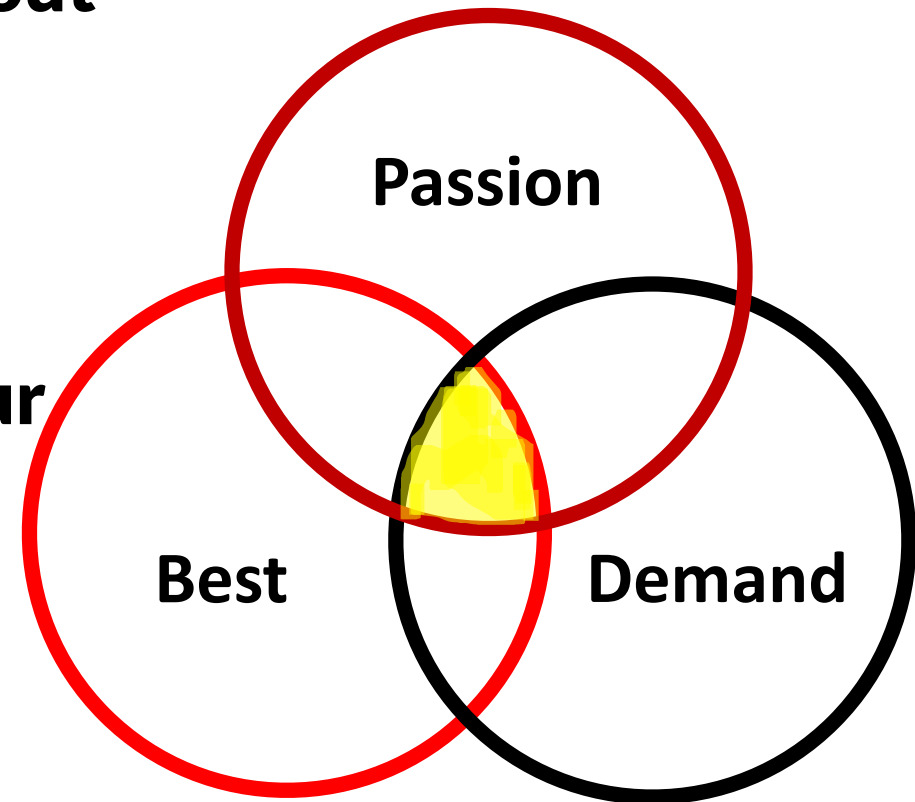


# What Role Do You Want



# 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**
  - ✓ **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 Access To Me,**  
**ANYTIME You Need It**



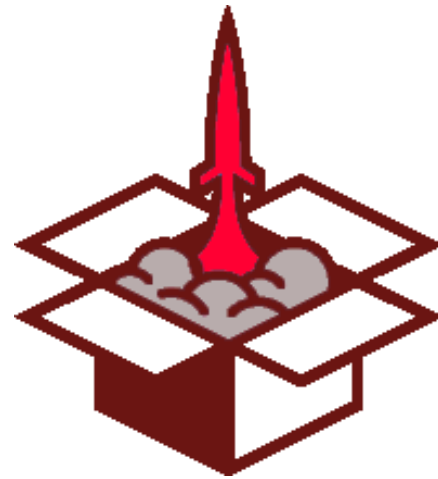
**And...**

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





# INTRODUCING...



— ★ ★ ★ —

# STRATEGIC PARTNERING WORKSHOP



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



**You Will Spend The 1<sup>st</sup> 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 **Live Virtual Workshop** Started 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**



**Because The Workshop Is Built Around  
Building Relationships, You Will Get  
Access To Strategic Partnering  
Community FREE For 6 Months**



# Inside **Strategic Partnering Community...**



# You're 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 Participants Of  
This Masterclass, I'm Offering **FREE** 6  
Month Access To The **Strategic  
Partnering Community** For...**



**ONLY \$497**



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



**So, There Is Literally **Zero Risk****



**BUT, This Offer **ONLY** Good For 3 Days**





**After **Friday At Midnight** Eastern The  
Price Will Be \$1997 A Year**



**AS A BONUS...**



# Free Apartment Investor Pro **Website**



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



# Let's Recap



- ✓ **Strategic Partnering Workshop (Lifetime Access) - \$997**
- ✓ **Strategic Analysis Workshop (Lifetime Access) - \$497**
- ✓ **Strategic Partnering Labs (6 Months Access) - \$9,997**
- ✓ **Strategic Partnering Community (6 Month Access) - \$1,997**
- ✓ **1-on-1 Mentoring And Support (6 Month Access) - \$9,997**
- ✓ **Free Apartment Investor Pro Website- \$397**
- ✓ **Your Business Partner/Spouse (FREE) - \$1,997**

**THAT'S \$25,879 IN REAL VALUE**



**ONLY \$497**



**ONLY For 3 Days**





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





If you want to be part of the **Strategic Partnering Workshop** and get access to the **Strategic Partnering Community** for 6 Months, **CLICK THE LINK BELOW** to claim your access TONIGHT...

<https://multifamily.davidmonroeccim.com/spw-checkout-masterclass>



Q&A