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DISCLAIMER: This is meant to be a starting point to get you thinking about investing and potential risks. It's not a complete list of how to run due diligence on investments. Investment decisions should not be based solely on this questionnaire. Seek appropriate legal and financial counsel as needed.

Analyzing Investment Opportunities Checklist

- How likely is the team to execute the strategy?

- What is their experience with this particular investment strategy?

- Is there a key person risk?

- Is there a sourcing deals risk?

- What are some variables that could impact returns outside of the control of the operators?

- Construction risks?

- Economic Recession Risks?

- Interest Rate Risks?

- Ongoing Property Maintenance Risks?

- Vacancy Risks?

- Resale Risks (long-term strategy or a flip)?

- Local Market Stability?

Questions:

1. What is the class of real estate (A, B, C)?

A

B

C

2. What is the class of the neighborhood(s) (Upper Class, Middle, Lower Income)?

Upper Class

Middle Class

Lower Income

3. How well do I understand this investment (0 to 10)?

4. What's my confidence in the team to execute their strategy?
