



REAL ESTATE INVESTMENT GOALS

One of the most important steps in starting to invest in real estate is to set goals. These goals must be specific, measureable, achievable, realistic/relevant and time-bound. While there's no requirement for the amount of goals that you should set, it's best to start with between 1-4 so as to not get overwhelmed. As you move forward with acquiring property it's a good idea to measure perspective properties against your goals and use that as a guide. Not sure where to start in goal setting? Call us today at 817-462-0303 or 713-974-8004.

Name:	Date:
--------------	--------------

CIRCLE ONE OF THE FOLLOWING STRATEGIES THAT YOU ARE INTERESTED IN:

Buy and Hold: This is where you buy a home and rent it out as a way to supplement your income. This passive income strategy allows you to build equity in a tangible asset and generates wealth over time through best landlord practices.

Buy and Flip: This is where you buy a distressed property, pay to have it renovated, re-sell it at a higher sale price, and earn a profit. This is usually a shorter term strategy to generate additional income/capital; 3-6 months depending on the amount of work required.

CIRCLE AND COMPLETE ONE OR MORE FINANCING OPTIONS THAT YOU ARE INTERESTED IN:

CASH: I have \$_____ in cash to invest.

SELF-DIRECTED IRA/401K: My IRA/401K administrator is _____. The current approximate value of my retirement account is \$_____.

HARD MONEY: I have \$_____ cash to invest and a credit score of _____.

CONVENTIONAL LOAN: I have \$_____ to put down and a credit score of _____.

DESCRIPTION OF <u>SHORT</u> TERM FINANCIAL/INVESTMENT GOALS	Achieve By...
Goal #1:	
Goal #2:	
DESCRIPTION OF <u>LONG</u> TERM FINANCIAL/INVESTMENT GOALS	Achieve By...
Goal #1:	
Goal #2:	

