

# Investment Flow Chart & Process

#### CONSULTATION

Brief consultation and review on the benefits of owning investment real estate & the services Velocity Real Estate & Investments can offer.

#### PORTFOLIO REVIEW

Review your financial position and determine current and future financial goals. ie.

- Retirement
- College Fund
- Annuity Stream
- Income

Determine resources available to purchase and maintain the property.

## PROPERTY VALUE, TYPE & LOCATION

Based on the portfolio review, determine the type and value of property that will meet the client's goals. ie.

- Single Family Home
- Duplex
- Multi-Family Unit

Determine the best geographical location based on the property type and value.

# **LOCATE MATCHING PROPERTIES**

Locate high-quality properties meeting the outlined parameters and determine up-front expenses concerning feasibility and marketability.

## PROPERTY ANALYSIS

Provide a full in depth financial analysis including Monthly Cash Flow and Return on Investment (ROI). This allows the client to clearly examine the benefits associated with the selected properties.

#### PURCHASING THE PROPERTY

Once the right property is selected we will ensure a smooth transaction from contract to purchase.

If needed, set up full management with an appropriate "Property Management Company" - Maintain asset in high-quality condition.

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