BILL JAMISON | INVESTING

Your Investment Buy Box

Define the criteria. Explore the opportunities.

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1. MY INVESTMENT VISION

Primary objectives: select any that apply.

- [ ] Rental income
- [ ] Long-term appreciation potential
- [ ] Portfolio diversification
- [ ] Financial flexibility
- [ ] Legacy wealth building
- [ ] Other: _____

Target holding period: _____

My preferred level of ownership involvement: _____

2. MY ACQUISITION CRITERIA

Target markets or neighborhoods: _____

Preferred property types:

- [ ] Single-family rental
- [ ] Duplex
- [ ] Small multifamily
- [ ] Condominium or townhome
- [ ] Value-add property
- [ ] Other: _____

Acquisition budget: _____

Preferred property condition: _____

Target unit count: _____

Renovation appetite and capacity: _____

3. FINANCING AND CAPITAL

Available down-payment capital: _____

Estimated closing and acquisition costs: _____

Potential improvement budget: _____

Desired cash reserves: _____

Financing approach: _____

Financial considerations requiring professional advice:

_____

_____

4. INVESTMENT PERFORMANCE CRITERIA

Target monthly cash flow: _____

Target cash-on-cash return: _____

Acceptable vacancy assumptions: _____

Planned maintenance and CapEx reserves: _____

Property management assumptions: _____

Financing assumptions: _____

Targets are planning criteria, not guarantees of investment performance.

5. RISK AND OWNERSHIP RESPONSIBILITIES

Risks I'm prepared to evaluate:

- [ ] Vacancy
- [ ] Repairs and capital expenditures
- [ ] Interest-rate changes
- [ ] Rental market changes
- [ ] Property management
- [ ] Liquidity and resale timing
- [ ] Regulatory considerations
- [ ] Other: _____

My approach to reserves and unexpected expenses:

_____

_____

_____

6. MY INVESTMENT BUY BOX SUMMARY

I am exploring: _____

In these markets: _____

Within this acquisition range: _____

With these property characteristics: _____

To support these financial and lifestyle goals: _____

MY LEADING QUESTIONS

1 _____

2 _____

3 _____

NOTES

Let's Explore Your Investment Strategy

Bring your completed Buy Box to a conversation with Bill. We'll explore your criteria, market considerations, and the possibilities that align with your goals.

Schedule a Conversation with Bill: JAM-WorldWide.com/invest

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Investment analysis involves assumptions and risks. Consult qualified financial, tax, and legal professionals for advice specific to your circumstances. Equal Housing Opportunity.

Print it. Write on it. Bring it to our first conversation.

We'll start from what you've written rather than from scratch.

If this helped, pass it to someone who's about to move.

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Company Mission: Be the Measure of a Balanced Life | Model the BOLD Entrepreneur | Consciously Connect Loving Communities

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