

# RENTAL PROPERTY STRATEGY

Prepared For: \_\_\_\_\_

Date: \_\_\_\_\_

## RENTAL PROPERTY

Address: \_\_\_\_\_ Value: \$ \_\_\_\_\_

## MORTGAGE

Outstanding balance	\$ _____	Monthly Payment \$ _____
Rate Structure	Adjustable      Fixed	Interest Rate _____ %
Is there a Balloon payment?	Yes      No	Balloon Payment \$ _____

## MAINTENANCE COSTS

Type of maintenance	Warranty Property Management Company	Self-managed Other	Average Monthly Costs \$ _____
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## INCOME

What is the monthly income received from this property? \$ \_\_\_\_\_

## NET PROFIT / LOSS

What is the monthly net profit / loss for this property? \$ \_\_\_\_\_

## OWNERSHIP STRUCTURE

If LLC, how does the LLC file?	Individual	LLC	S-Corp	C-Corp
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## PROPERTY GOAL

If goal is to sell      Expected sale date: \_\_\_\_\_      Target Price: \$ \_\_\_\_\_

If goal is to use a Legacy Device	Estate Tax Issue	Estate Planning Issue	Trust Consideration
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## RECOMMENDED NEXT STEPS