

RENTAL PROPERTY STRATEGY

				Date	
ADDRESS				VALUE	
MORTGAGE					
Outstanding balance				\$	
Interest Rate				<input type="checkbox"/> Adjustable <input type="checkbox"/> Fixed	
				%	
Monthly Note				\$	
Is there a Balloon payment?				<input type="checkbox"/> Yes <input type="checkbox"/> No	
MAINTENANCE COSTS					
Type of maintenance				<input type="checkbox"/> Warranty <input type="checkbox"/> Self-managed	
What is monthly average cost?				\$	
INCOME					
What is the monthly income recieved from this property				\$	
NET PROFIT / LOSS					
What is the monthly net profit / loss for this property				\$	
OWNERSHIP STRUCTURE				<input type="checkbox"/> Individual <input type="checkbox"/> LLC	
If LLC, how does the LLC file?				<input type="checkbox"/> S-Corp <input type="checkbox"/> C-Corp	
PROPERTY GOAL				<input type="checkbox"/> Sell <input type="checkbox"/> Legacy	
If goal is to Sell		Expected sale date		Target Price \$	
If goal is to use as Legacy device		<input type="checkbox"/> Estate Tax issue <input type="checkbox"/> Estate Planning issue <input type="checkbox"/> Trust Consideration			
NOTES AND/OR RECOMMENDED NEXT STEPS					