

# Investing In Your First *Real Estate* *Syndication*



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**When it comes to investing in real estate, most people are fairly familiar with the process of buying a single-family home or rental property.**

**You choose the market and neighborhoods, determine how many bedrooms and bathrooms you're looking for, get together with a lender and a broker, tour potential properties, and then make an offer.**

**However, when it comes to investing in a real estate syndication (group investment), the process can be entirely foreign, especially if you've never invested in syndications before.**





# STEP #1 – DETERMINE YOUR INVESTING GOALS

Think about the amount of capital you have to invest, the length of time you want that capital invested, tax advantages you're looking for, and whether you are investing primarily for ongoing cash flow to help offset your income, long-term appreciation, or a hybrid of both.



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# STEP #2 – FIND A FITTING OPPORTUNITY

Take time to properly vet the sponsor team, ask them your questions, and read between the lines of any investment materials they provide.

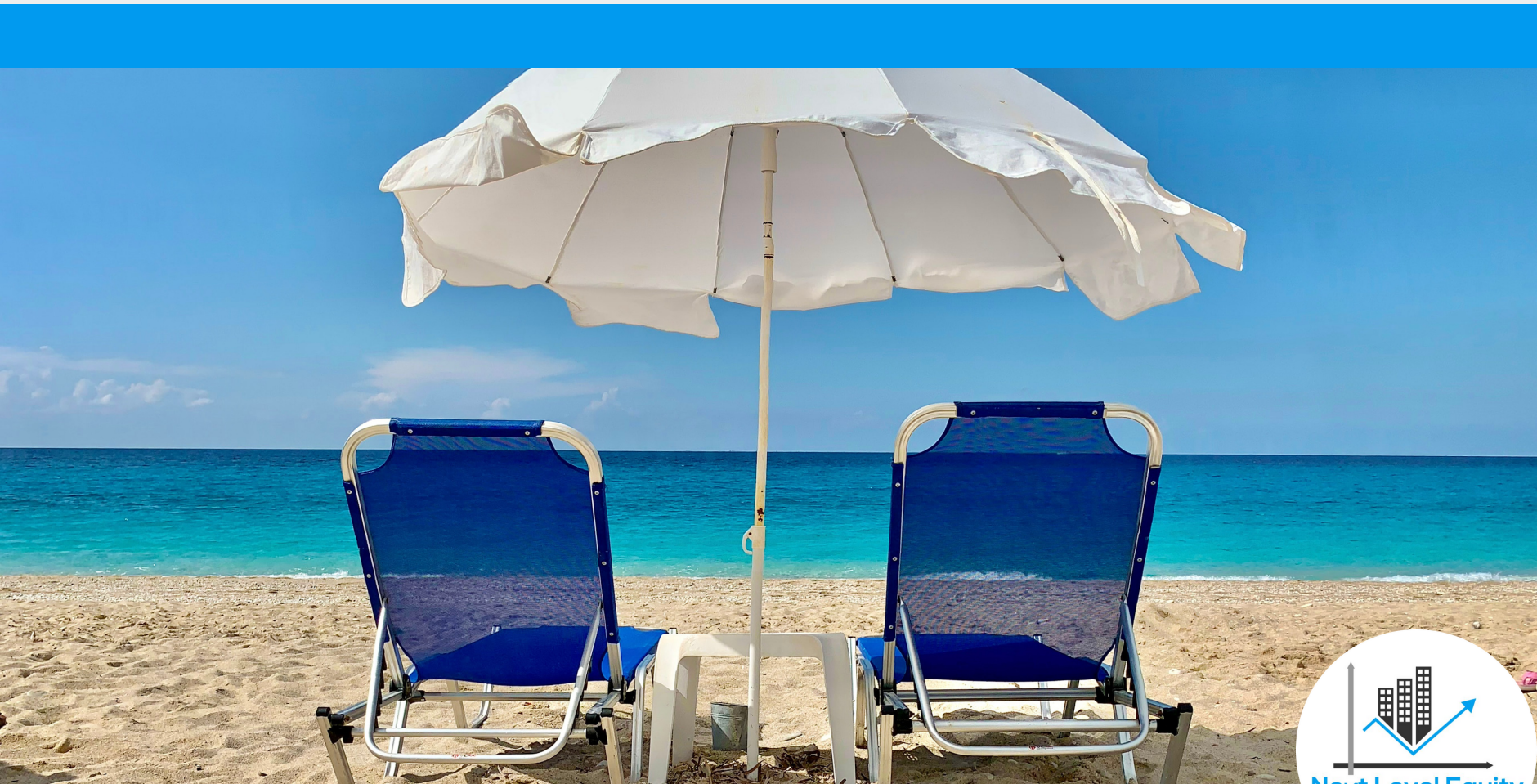
Determine if the business plan has multiple exit strategies, whether there are signs of conservative underwriting, and double-check whether the proposed business plan makes sense given the asset class, submarket, and current economic cycle.





# STEP #3 – RESERVE **YOUR SPOT** IN THE DEAL

The option for a soft reserve may be available, which holds your spot while you take time to review the investment materials. So, you might combine Steps #2 and #3 by reviewing the executive summary, reserving your spot in the deal, then reviewing the rest of the materials.



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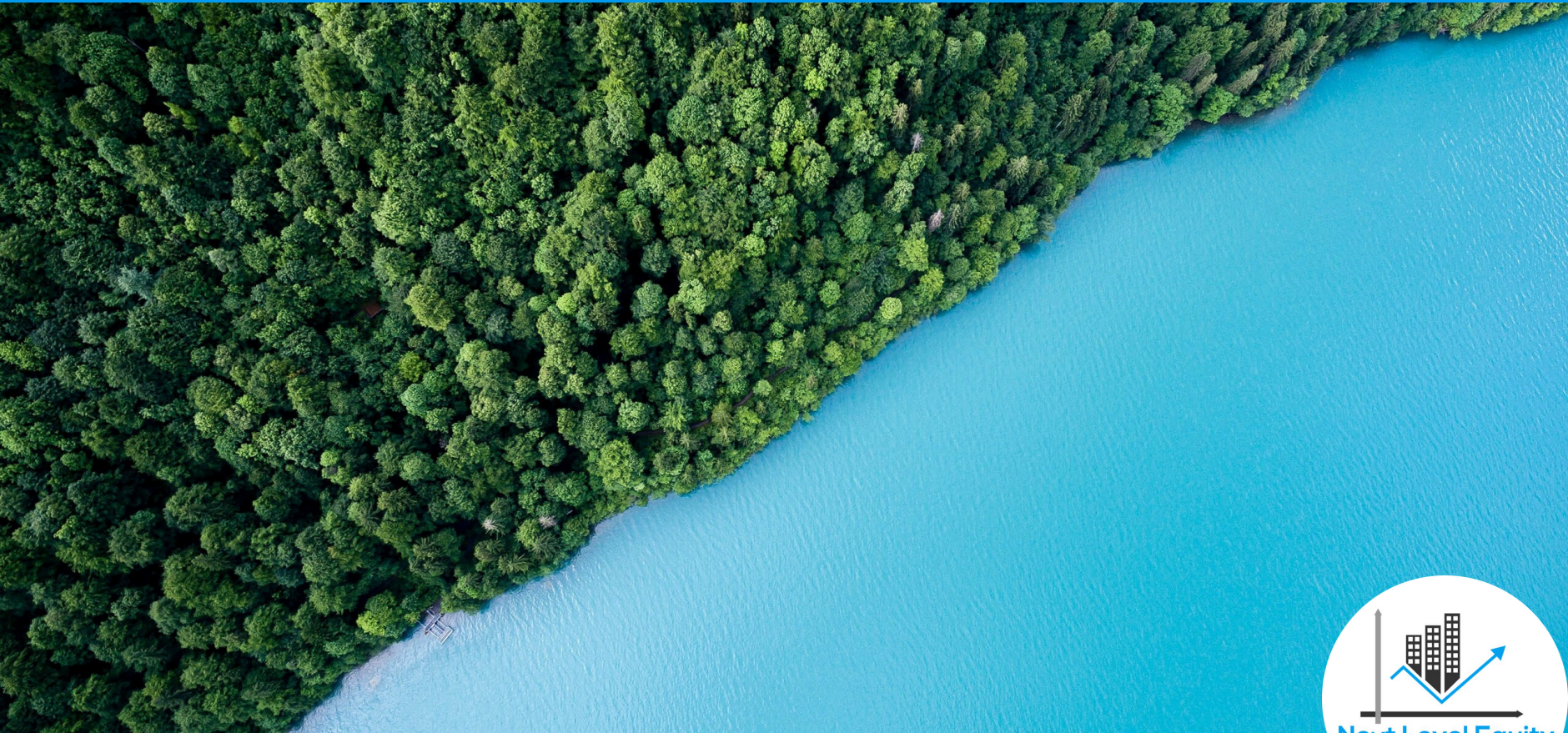




# STEP #4 – REVIEW THE PPM

Once you've decided to invest in a deal, the first official step is to review and sign the PPM (private placement memorandum).

This legal document provides in-depth details about the investment opportunity, the risks involved, and your role as an investor. Although reading legal jargon may be no fun, it's very important you gain a full understanding of the risks, subscription agreement, and operating agreement pertaining to the investment.





# STEP #5 – SEND IN YOUR FUNDS

Once you've completed the PPM, the final step is to send in your funds. Typically, you'll find wiring instructions in the PPM document.

**Pro tip:** Before wiring your funds, double-check the wiring information, and let the deal sponsor know to expect it so they can be on the lookout.





By now, the process of investing in a real estate syndication should be more clear, and perhaps, a little less intimidating.

Don't worry though, if this process still seems a bit daunting. That's what we're here for, and we'll be with you every step of the way as you invest in your first real estate syndication.

As you review and invest in more deals, the process will become second-nature.

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TO **PASSIVE**  
REAL ESTATE  
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NOW**



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"TELLS YOU STEP BY  
STEP HOW TO GET  
STARTED"

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