

Investor Vision & Strategy Planner

**Build Wealth. Generate Cash Flow.
Create a Legacy.**

Presented by Amy DeBusk



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MORTGAGE MADE EASY ACADEMY



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Welcome

Congratulations on taking the first step toward building long-term wealth through real estate. This planner will help you clarify your goals, define your investment strategy, and create a roadmap toward financial freedom and generational wealth.

PART ONE: YOUR WHY

- **What inspired you to begin investing in real estate?**

- **What does financial freedom mean to you?**

- **If money were no longer a concern, how would your life change?**

- **What legacy do you hope your investments will leave for your family?**

PART TWO: DEFINING SUCCESS

- **Imagine it is ten years from today. What would your ideal life look like?**

- **How would real estate fit into that vision?**

- **Complete this sentence: My real estate portfolio allows me to...**

PART THREE: YOUR INVESTMENT GOALS

- **Which of the following motivate you?**

- ☐ Building wealth
- ☐ Monthly passive income
- ☐ Retirement income
- ☐ Replace W-2 income
- ☐ Generational wealth
- ☐ Leave a legacy
- ☐ Financial freedom
- ☐ Diversify investments
- ☐ Potential tax advantages (consult your CPA)
- ☐ Inflation protection
- ☐ Other

- **My monthly passive income goal is:**
- **My annual retirement income goal is:**
- **My target retirement age is:**
- **How many investment properties would you ultimately like to own?**
 - ☐ 1
 - ☐ 2-5
 - ☐ 5-10
 - ☐ 10+

PART FOUR: YOUR INVESTMENT PERSONALITY

- **Which statement best describes you?**

- | | |
|--------------------------------------|--|
| ☐ Buy & Hold | ☐ Cash Flow |
| ☐ Value-Add | ☐ Calculated Risk |
| ☐ Renovations | ☐ Still Exploring |

- **Which strategies interest you?**

- | | |
|--|---|
| ☐ Buy & Hold | ☐ Multi-Family |
| ☐ BRRRR | ☐ Commercial |
| ☐ Fix & Flip | ☐ Ground-Up Construction |
| ☐ Long-Term Rentals | ☐ Unsure |
| ☐ Airbnb | |

- **Why do these strategies appeal to you?**

PART FIVE: DESIGNING A LIFESTYLE YOU LOVE

- **How involved do you want to be?**

- ☐ Hands-on
- ☐ Somewhat Involved
- ☐ Mostly Hands-off
- ☐ Passive

- **Would you rather self-manage or hire a professional property management company? Why?**

- **How much time can you realistically devote each month to your investments**

- **Where would you like to invest?**

- ☐ Near Home
- ☐ California
- ☐ Out of State
- ☐ Vacation Destinations
- ☐ College Towns
- ☐ Growing Markets

- **Would you enjoy traveling to your investment properties? Why or why not?**

PART SIX: BUILDING YOUR TEAM

- **Who do you already have on your investment team?**

- **Who do you still need? (Mortgage Advisor, Realtor, CPA, Financial Advisor, Trust Attorney, Property Manager, Insurance Advisor, Contractor, Bookkeeper, Handyman)**

PART SEVEN: YOUR LEGACY

- **What does generational wealth mean to you?**

- **How would you like your investments to impact your family?**

- **If your real estate portfolio could give you one gift ten years from now, what would that gift be?**

PART EIGHT: YOUR 90-DAY ACTION PLAN

- My next investment goal is...

- The biggest obstacle standing in my way is...

- My next three action steps are...

- My target purchase date is...

- What questions do I still have?

You're Closer Than You Think

Every successful investor starts with a vision, but those who build lasting wealth take action. Keep this planner, revisit it often, and update it as your goals evolve. When you're ready, **schedule your complimentary Investor Strategy Session** with Amy DeBusk Home Loans.