

1. Accelerated Investor Coaching Class 5 out of 17

- a. www.xmind.net
  - i. mind map software free download
- b. SECURITIES ACT 1933
- c. SECURITIES ACT 1934
  - i. created a platform Broker/ Dealer's could sell securities
  - ii. Exemption's
    1. "REG D"
      - a. FEDERAL RULES AND EXEMPTIONS
        - i. Federal Filing
          1. 506 (c) w/ 506 (b) offering
- d. INTRASTATE OFFERING
  - i. you
  - ii. your business
  - iii. your houses
  - iv. your private lenders
  - v. all within your state
  - vi. REGULATED BY YOUR STATE
  - vii. Able to Raise Up To \$1M
    1. 4 states where you can raise only up to \$500,000
  - viii. IF YOU DO NOT CROSS STATE LINES AND YOU DO NOT GENERAL SOLICITATION / ADVERTISE YOU DO NOT HAVE TO REGISTER IN MOST STATES
  - ix. The STATE SECURITIES DEPT requires that you have a prior existing relationship from anyone you raise money from if you are doing an INTRASTATE OFFERING
    1. known at least 30 days
    2. had 3 touches during your lifetime
    3. THEN
      - a. you can market to them
      - b. you can make an offer
- e. OFFER
  - i. Amount of money
  - ii. Interest rate
  - iii. Equity that you give
  - iv. Property that you want them to invest in
  - v. company you want them to invest in
  - vi. Fund
- f. IF YOU ARE GOING TO RAISE MORE THAN \$1M, IF YOU ARE GOING TO ADVERTISE, OR IF YOU ARE CRISS CROSSING STATE LINES THEN YOU SHOULD DO A FEDERAL FILING
- g. DISCLAIMER / DISCLOSURE
  - i. i am not a attorney
  - ii. i am not a financial planner
  - iii. i am not a accountant or financial adviser
  - iv. Everything i say today is for informational purposes only
- h. The BIG QUESTION?
  - i. why do real estate investors focus on sellers and buyers WITHOUT focusing on funding?
  - ii. serving private lenders first is the foundation for a winning business model and mindset
  - iii. giving starts the receiving process
  - iv. you biggest asset is your list of relationships
    1. its most cost affective
    2. easiest to break thru

i. Definitions

i. PPM

1. Private Placement Memorandum
2. "Disclosures"
3. you only need these IF you are going to raise OVER \$1million dollars or If are going to criss cross state lines or if you want to advertise
4. ONLY needed if you are doing a federal registration

ii. Executive summary

1. Summary of your offer
2. summary of the PPM
3. EXEC SUMMARY DOES NOT TELL A POTENTIAL INVESTOR THE SPECIFICS
4. typically 4 pages

a. 1

i. debt or equity financing

1. DEBT finance

- a. LOANS to pay for expenses
- b. guaranteeing someone repayment of principal PLUS interest
- c. THIS IS WHAT JOSH DOES MOSTLY
  - i. NOTE AND MORTGAGE / DEED OF TRUST

2. Equity Financing

- a. Give up STOCK / ownership in your LLC to pay for expenses
- b. IS when someone gives you cash and you give them a piece of either your LLC or your deed

ii. EX

1. Facebook

- a. IPO - initial public offering
  - i. Equity Financing

iii. Note

1. I - OWE - YOU
2. PROOF OF THE LOAN
3. Contract the spells out the terms of the loan
4. who is borrower
5. who is the lender
6. how much principal
7. what is interest rate
8. how is intrest to be paid
  - a. monthly quarterly
  - b. annually
9. Balloon
  - a. all interest PLUS all principal is due
10. JOSH's NOTES
  - a. 12% interest or 15% of my profits whichever is higher due in 1 year
    - i. zero monthly payments
    - ii. all due when the house sells

iv. Mortgage / Deed of trust

1. Security Instrument to record "SECURING" the note to the house
2. THE MORTGAGE / DEED OF TRUST ONLY SAYS THE FOLLOWING

- a. who was the lender
- b. who is the borrower
- c. what property was it loaned on
- d. the amount of the loan
- e. MORTGAGE does NOT SAY THE REPAYMNET PLAN
- v. Secured Loan
  - 1. With Mortgage
- vi. Unsecured Loan
  - 1. No Mortgage
  - 2. like a credit card
  - 3. unsecured loan without any collateral
- vii. Line of Credit
  - 1. Bank Loan with a revolving amount of money where you can borrow and pay back at will
  - 2. EX
    - a. they take a loan out against their own personal residence
      - i. Has equity in their personal residence
    - b. they take out the loan at 4% then loan the money to you at 12%
      - i. "Financial ARBITRAGE"
      - ii. this is what the bank do
        - 1. get CD money at 2%
        - 2. loan it out at 5%
- viii. Public Offering
  - 1. Available for the Public to invest
    - a. WE DON'T DO THIS UNLESS WE ARE REGISTERED
- ix. Private Placement
- j. Private Placement vs Public Offering
  - i. Notes and mortgages ARE securities
  - ii. Intrastate Exemption
    - 1. each state has an exemption for how many lenders/ notes you can have without having to make a large expensive PPM filing
  - iii. OVER \$1Million dollars
    - 1. criss cross state lines borrowing money and doing deals in multiple states
      - a. I highly recommend tht you do a PPM and register on a federal level.
- k. Questions to ask Ralph on Monday
  - i. My family is out of state
  - ii. Out of the country Money - FEDERAL
  - iii. is there a limit to how many investors per property
  - iv. how do i secure the funding if i have a private lender but i don't have a deal yet
- l. #1 Raise Money from People that I HAVE a prior existing relationship with
  - i. Public offering versus a private placement
    - 1. 3 touches & 30 days
      - a. in order to make someone an offer
      - b. this moves the offering from public to private b/c you now have a prior existing relationship

2. NOTE

- 1. 10% fixed
- 2. 12% fixed OR 15% of my profit
  - a. it does need registered
    - i. FORM D
    - ii. \$100

- iii. Rule 504, 505 and / or 506
        - b. variable yield on note
    - 3. mortgage
      - a. secures note to the house and is recorded at county recorders office
  - ii. B)
    - 1. Equity partnership
    - 2. Business
      - a. LLC
        - i. partner on deals
        - ii. Chuck finds the deals
        - iii. Josh puts up the money
        - iv. LLC
          - 1. 50/50
          - 2. 80/20
          - 3. 20/80
          - 4. 75/25
          - 5. 65/35
      - 3. Joint Venture
      - 4. DOES NOT NEED REGISTERED / NOT SECURITY in most cases
  - iii. C)
    - 1. under 10
      - a. Limited number of people/ investors
    - 2. over 10
      - a. Private Placement Memorandum
      - b. PPM
- b. "THE PROCESS"
  - i. #2 Raising money from the public / strangers or people we DO NOT HAVE a prior existing relationship with
    - 1. A)
      - a. create a prior existing relationship
        - i. talk about my deals
        - ii. talk about sample deals / examples
        - iii. without asking them for money
    - 2. B)
      - a. Equity partnership
      - b. Business
        - i. LLC
          - 1. partner on deals
          - 2. Chuck finds the deals
          - 3. Josh puts up the money
          - 4. LLC
        - c. Joint Venture
        - d. DOES NOT NEED REGISTERED / NOT SECURITY
    - 3. C)
      - a. so long as you are advertising partnerships/ joint ventures/ stock in LLC
    - 4. D)
      - a. equity partnership
      - b. LLC
      - c. 65/35
        - i. shares of LLC

- d. 100k
  - e. 40,000
  - f. 35%
    - i. \$13,666
      - 1. 6 months
        - a. \$27,300 approx
      - 2. annualized return %27.3
  - g. 65%
    - i. \$26,333
  - ii. Point of The Project 100 is to build a list of potential private lenders and referral sources
    - 1. "DISCOVER YOUR SPHERE"
  - iii. Point of the List is to send them marketing materials / newsletters
  - iv. Point of the marketing / newsletter is to be the top of mind reference when the person thinks of real estate: buying, selling, investing
  - v. Point of the marketing is also to Create Phone conversions
  - vi. Point of the phone is to set a face to face meeting (virtual face to face meeting)
    - 1. skype
    - 2. facetime
    - 3. gotomeeting
  - vii. point of the meeting is to present them the PRIVATE CAPITAL PPT
    - 1. show them what you do
  - viii. point of the ppt is to get to the end and ask them "Hey do you know anyone who may be interested in learning more about what i do?"
  - ix. and they say "WHAT ABOUT ME?"
    - 1. "EXCLUSION MENTALITY"
      - a. I'm excluding them and NOT making them an offer so they want to work with me.
      - 2. exact opposite of what they are expecting
      - 3. they are expecting you to pitch them
      - 4. when you don't they are let down BUT the respect you and want to work with you
- c. Lender (DEBT FINANCING) or Partner (EQUITY FINANCING)
- i. Note and Mortgage
    - 1. Note (debt instrument)
      - a. I Owe YOU!!!
        - i. who is borrower
        - ii. who is the lender
        - iii. what is the interest rate
        - iv. when is the interest due and paybale
          - 1. monthly
          - 2. quarterly
          - 3. annually
          - 4. balloon feature
            - a. pay it all back plus interest on the date agreed on
  - v. Payback
    - 1. Examples
      - a. 1 yr balloon
      - b. 5 year Balloon
      - c. 10 year balloon
      - d. simple interest

- e. monthly amortization
- vi. my 40k flips notes
  - 1. 12% interest OR 15% of profit, zero payments, all interest is due when the property sells and everyone is paid at the same time, 1 year balloon
- vii. 1st note
  - 1. 60k
    - a. 18% interest
      - i. 5 year note
      - ii. interest payable annually
      - iii. \$10,800
  - 2. 90k
    - a. 10%
      - i. 5 year note ballon
      - ii. unsecured
  - 3. 50k
    - a. 10%
      - i. 5 year note w/ balloon
      - ii. unsecured
- b. promissory note
  - i. promise to pay
    - 1. contractual agreement
- c. Equity Participation Note 8575 Melody Lane Macedonia Ohio 44056 1st mortgage Pete Vagt 60k 12.27.2012 clean 2nd draft with notary FINAL.docx
- d. secured s. unsecured
- 2. Mortgage (security instrument) ~OR~ deed of trust
  - a. security
  - b. collateral
    - i. anything to back a note
    - ii. anything as a basis of repayment
  - c. gets recorded in county recorders office
  - d. mortgage interest
    - i. cannot sell the property or refi it until the debt is repaid
  - e. 8575 Melody Lane Macedonia Ohio 44056 1st mortgage Pete Vagt 11.13.2012.docx
- 3. Notary
  - a. Mortgages
    - i. DO have to be notarized
  - b. Notes
    - i. do not have to notarized
- ii. partnerships and LLC's
  - 1. profit is in the NET INCOME after expenses
    - a. example
      - i. party (A) finds deals
        - 1. finds the house
          - a. outoursces the improvements
        - 2. this is you / the real estate investor
      - ii. party (B) puts up all the money
        - 1. put up \$200,000 and funds the LLC
      - iii. 50/50 split of profit
      - iv. 200k invested

1. 50k profit
    - a. 25k each
  2. 200,000 returned to the operating acct
    - a. 25,000 distribution each
  3. buy a house for \$150,000
  4. \$35,000 improvements
  5. \$185,000 used
  6. resell house for \$275,000
  7. Profit is \$60,000
    - a. split 50/50
    - b. 30k each
  8. takes 5 months
  9. ROI
    - a. 200k invested
      - i. 30k returned
      - ii. 5 months
      - iii. 198.68 per day
      - iv. 72,516 annualized
      - v. %36.25 annualized return
2. TYPES OF LEGAL ENTITIES
- a. Sole Proprietorship
    - i. little or no liability protection
  - b. Corporations
    - i. LEGAL entity is responsible for its own liability protection
  - c. Limited Liability Company
    - i. LLC
      1. flexibility with liability protection
      2. you can elect as a how you want to be TAXED
      3. operating agreement
        - a. how are decisions made
        - b. whats the agreement with partners
3. LLC
- a. is a corporation
  - b. limits personal liability
  - c. members
  - d. "units"
    - i. a measurement of your ownership interest
    - ii. 100 units
      1. 60%
        - a. = 60 units
      2. 40%
        - a. = 40 units
    - iii. 1000 units
  - e. K-1 for taxes
4. partnership
- a. personal liability for the actions of the partnership
5. "operating agreement" states how the company is managed
- a. sets forth the agreement with your investor / partner
  - b. contract with your partners
  - c. level of control
  - d. communicate the progress to all members of LLC
  - e. bullet points

- i. who are partners
    - ii. whats the goal
    - iii. how are profits distributed
    - iv. tax planning
  - 6. How do you start an LLC?
    - a. i'll show you how to set up the first one then show you how to do it yourself
    - b. secretary of states website
    - c. fill it out, mail it, pay the \$\$ and your done
    - d. LEGAL ZOOM?? // LLC.COM??
      - i. must have a statutory agent = receives mail for the LLC
  - 7. get advice for setting up your operating agreement from your attorney
  - 8. DAVID STREETER
    - a. 216-407-6644
    - b. streeterlaw@gmail.com
  - 9. equity partnership spreadsheet
    - a. cover on Class 4
  - 10. no note or mortgage
    - a. no fixed interest rate
- d. ALL THE PLACES OR FORMS OF FUNDING
  - i. SD IRA'S
    - 1. Traditional, Roth, Sep, Coverdale Education Savings Acct (CESA), HSA
    - 2. Self Directed IRA's
      - a. Old 401k
      - b. old pension
      - c. old IRA
      - d. NEW IRA
      - e. they can self direct their own money
        - i. you choose all your investments
    - 3. Most people are not really paying attention to their retirement accts
    - 4. they have an old 401k
    - 5. they roll it over to an IRA
    - 6. they are not really paying attention to it
    - 7. so when i say "hey you can self direct" and get 12% minimum at they are like" hey i wish i met you earlier
  - ii. Old 401k
  - iii. old pension
  - iv. old IRA
  - v. Lines of Credit
  - vi. Mutual Fund Acct / Brokerage Accts
    - 1. Merrill Lynch
    - 2. stocks
    - 3. mutual funds
  - vii. SAVINGS ACCT
  - viii. CD's
  - ix. CHECKING ACCTS
  - x. BUSINESS CHECKING ACCTS
- e. Self Directed IRA custodians
  - i. iPlan Group
  - ii. Jill Banner
    - 1. CEO
  - iii. 440-484-5566

- iv. Coaching Class #3
  - 1. Live
  - 2. we will go thru the forms and documents to set up SD IRA's for yourself and your private money partners
- f. What are your goals?
  - i. Buy, Improve and sell?
    - 1. 4 months
      - a. buy fix and sell
    - 2. 6 months
      - a. buy fix and sell
    - 3. 120 days
      - a. at best
    - 4. thinking
      - a. 30- 60 days
        - i. improvements
      - b. 45 days to close
        - i. once a buyer is under contract
        - ii. bank loan
    - 5. 12% interest or 15% of profits whichever is more
  - ii. back to back Closing??
  - iii. Rental?/ RENT TO OWN 2-5 year partnership
    - 1. 7-11% interest per year / per month
    - 2. Plus 10-15% of the profit bonus when the house sells
    - 3. their overall ROI will be around 12-15-20% over the entire course of their investment with you
- g. ROI expected
  - i. rehab fix and flip
    - 1. 12-22%
    - 2. Ex
      - a. \$500 - 2 points up front PLUS 1 point per month
    - 3. Ex
      - a. 12% or 15% of profit - whichever is greater
  - ii. back to back closing
    - 1. 2 pts
    - 2. 2500 dollars
    - 3. whichever is greater
  - iii. rental 2-5 years
    - 1. 7-11%
    - 2. single family
    - 3. apartment
    - 4. self storage
    - 5. monthly payments - must commit to monthly payments
  - iv. 30-90 day money
    - 1. 22-25%
      - a. annualized interest on their money
    - 2. toughest money to get
      - a. from a private money lender or a hard money lender
    - 3. buy it, put it right back on the market in its as-is condition
    - 4. short sales where we get an incredible discount
      - a. house needs no work
    - 5. reo
      - a. house needs little work

- 6. fsbo
  - a. house needs little work
- 7. EX
  - a. 2 pts and 15%
- v. determine capital required
  - 1. 1171 Gardner road
    - a. PP \$56905
      - i. Bank Of America REO
    - b. Improvements \$25,000 - \$27,000
      - i. carpet, paint, 3 bathrooms, drywall, kitchen, landscaping,
      - ii. roof, siding,
    - c. \$81,905
    - d. \$4,000
    - e. \$86,000
    - f. Launching June 2nd
    - g. List Price 149,9000
    - h. Sell Price 135,000
      - i. ACTUAL SOLD PRICE
        - 1. \$136,000
    - i. Net proceeds 122,000
      - i. \$124,300
    - j. Profit 40,000
      - i. \$7000
    - k. NET NET \$33,000
- h. Sweet Spot
  - i. Easy Money
    - 1. 50k - 500k in their accts / retirement accts
      - a. 35 year old - 55 years olds
        - i. "regular guy"
          - 1. medical sales
          - 2. banker
          - 3. engineer
          - 4. managers
          - 5. operations managers
          - 6. steel worker
          - 7. Air traffic controller
          - 8. mortgage broker
          - 9. SWEET SPOT
            - a. old 401k
            - b. old IRA
            - c. old pension
            - d. old 203b
            - e. old Thift savings
            - f. old annuities
          - 10. new 401k
    - ii. these guys are switching jobs every 5 years
- ii. Big Money
  - 1. Accredited Investors
    - a. \$1M Net Worth
    - b. \$200 personal income single
    - c. \$300k Personal income Married
    - d. \$250,000 investment on average

- iii. Real Big Money
  - 1. Institutional Money
    - a. Hedge Funds
    - b. Private Equity Funds
    - c. Pension Funds
- iv. Tough Crowd
  - 1. 1M+
    - a. = married to their financial advisors
    - b. Stock broker
    - c. Financial planner
    - d. attorney
    - e. special treatment
      - i. access to private money managers who 1M< don't have access to
  - 2. Little Old Lady
    - a. 65+
      - i. all they care about is SECURITY
    - b. Son/ daughter
      - i. manages their money
      - ii. the last thing the son / daughter is going to do is put their mom's money at risk
- i. Make 2 lists
  - i. #1 list of people you already know
    - 1. Project 100
      - a. they can refer
      - b. they can cheerlead
      - c. they can lend
      - d. they may also want to buy or sell from you
    - 2. DiscoverYourSphere.pdf
    - 3. YOU CAN TAKE THEIR INVESTMENT IMMEDIATELY
    - 4. YOU CAN MAKE THEN AN OFFER IMMEDIATELY
    - 5. YOU CAN APPROACH THESE PEOPLE
  - ii. #2 List of places you can go meet more potential partners
    - 1. Golf Courses - Country Clubs
      - a. \$400 a month
    - 2. Chamber of Commerce
    - 3. REIA clubs
    - 4. Kiwanis
    - 5. Hondros
    - 6. Kids soccer games
    - 7. kids basketball games
    - 8. BNI
    - 9. Meeting Ups
    - 10. boating / boats
      - a. docks
    - 11. real estate agents
- iii. Professional Financial Advisors / Investment Managers / Stock Brokers / Insurance Sales People
  - 1. "Selling Away"
    - a. Cannot Sell unregistered securities that their broker dealer hasn't endorsed
  - 2. Securities dealers

- a. Bart = Wells Fargo Financial Advisors
  - i. 22 page affidavit every year
- 3. are not sources of leads b/c they cannot "sell away"
- j. Tell everyone about what you do "in a cool way"
  - i. My Elevator Pitch
    - 1. Hey Josh what do you do?
    - 2. Well, I raise capital for real estate!
    - 3. My favorite
      - a. I raise money for real estate deals. i raise money from private investors, we buy foreclosures and pay we investors a fixed double digit rate of return
      - 4. I own a bunch of real estate businesses and i raise capital to fund projects. i work with investors and pay them a double digit rate of return
      - 5. BECAUSE ITS SUPER SEXY!!!!!!!!!!!!!!
      - 6. response
        - a. oh thats great i've always wanted to buy a rental!!
        - b. oh kind of like carlton sheets / late night infomercials
        - c. sounds interesting tell me more
    - ii. Develop 12 second Elevator Speech
  - k. Create marketing collateral IE "handouts and mailers"
    - i. JOSH DFY it's in AI members area
    - ii. Investment Highlights Document.docx
    - iii. Improving Communities Document.docx
    - iv. Neighborhood Flyer Document.docx
    - v. IRA Vacation Flyer Document.docx
    - vi. Equity Participation Note 4034 Manchester Road Akron Ohio 44319 1st mortgage SAMPLE FOR PUBLIC 8.27.2012.docx
    - vii. 4034 Manchester Road Akron Ohio 44319 1st Mortgage SAMPLE FOR PUBLIC 8.27.2012.docx
  - l. Create funding powerpoint
    - i. JOSH DFY it's in AI members area
    - ii. Millennium Capital Inv FINAL 5.2.13.pptx
  - m. Create investor/ partner Questionnaire
    - i. JOSH DFY it's in AI members area
    - ii. Evaluation Document.docx
  - n. Develop a system for tracking potential private lenders
    - i. show google doc
    - ii. basecamp
    - iii. high rise
  - o. Send out a monthly mailer to your list of physical addresses
    - i. people you have a PER
    - ii. people you don't have a PER
  - p. email your monthly mailer to your list of email addresses
    - i. people you have a PER
    - ii. people you don't have PER
  - q. fiverr.com
    - i. Buy a logo \$5
  - r. www.odesk.com
    - i. high a graphic designer
  - s. Newsletter System
    - i. 3rd tuesday of each month
      - 1. newsletter is due

- a. 1st draft
- ii. 3rd wednesday of each month
  - 1. newsletter is approved by josh
- iii. 3rd thursday
  - 1. newsletter is final and sent to printer
- iv. 3rd friday
  - 1. newsletter is mailed out to everyone on my list
- v. MAC - "PAGES"
- vi. writer
  - 1. www.textbroker.com
  - 2. 99copywriters.com
  - 3. 99designs.com
  - 4. real estate commentary
    - a. www.kcmblog.com
    - b. dsnews.com
- vii. designer
  - 1. www.odesk.com
- viii. newsletters
  - 1. Millennium - September\_2011\_MH Edits 10-11-11.docx
  - 2. Millennium Apr 2013.pdf
  - 3. Millennium April 2012 FINAL 4.4.2012.docx
  - 4. Millennium Feb 2013.pdf
  - 5. Millennium July Final 6.28.2012.docx
  - 6. Millennium Mar 2013.pdf
  - 7. Millennium May 2012 FINAL 4.26.2012.docx
  - 8. Millennium Newsletter June 5.24.2012.pdf
  - 9. Millennium Nov FINAL 10.24.2012.pdf
  - 10. Millennium Sept PDF FINAL 9.9.2012.pdf
  - 11. September 2011 the millennium.docx
  - 12. Sharp Millennium FebMar 2012.docx
  - 13. Willowmere OM kyle garifo 10.31.2012.docx
  - 14. Mill Prop Prespectus Ashford Glen.pdf
  - 15. Mill Prop Prespectus Ashford Glen.docx
  - 16. Mill Prop Prespectus Marmore Ave 8.1.2012.docx
  - 17. Funding Opp-4166 Ardmore 9-28-11.pdf
- t. FEBRUARY FUND RAISING PLAN
  - i. Postcards going to my existing private lenders and existing database of contacts / network / investors
    - 1. Press release and the 13% return that we pay
    - 2. Disclaimer: 506C registration and "For Accredited Investors Only"
    - 3. Messaging
      - a. 13% fixed return back by real estate
      - b. Passive investor
      - c. Be The Bank
      - d. Beat The market
  - ii. Websites along with FB PPC (UNLESS YOU HAVE A 506C FED SEC REGISTRATION)
    - 1. segment by area, age, city, interests
    - 2. opt in
    - 3. A/R
    - 4. Survey
    - 5. Phone Number
    - 6. Sales Funnel

- iii. Funding Opportunity Sheets
  1. Email Broadcasts about deals that we are funding
- iv. Funding Opportunity Webinars
  1. emails broadcasts webinar registration
  2. pitch deck of deals we want to fund / need funding / raise capital
  3. every other friday for rest of the year 2015
  4. Thursday
  5. Friday
- v. SEMINARS
  1. buying a list of CD owners / IRA owners
  2. 55 yrs and older
  3. FFC seminar
  4. walk them and teach them about private lending
  5. "13% fixed return"
  6. "for accredited investors only"
  7. wedding style envelopes
  8. \$5k - \$8k
    - a. dinner
    - b. ice tea
    - c. room
    - d. marketing
  9. Sign up for one on one
    - a. INVESTMENT ADVISOR
- vi. Agent Partner Program
  1. "AGENT"
    - a. legal term for someone who represents the company
  2. Feb 6th & 7th - Cleveland
  3. 506 C registration
- vii. Sales Funnel
  1. Senior Investment Advisor
    - a. Outside Sales
    - b. Pitch Man
    - c. Seminars
    - d. Large Groups
    - e. Industry conference
    - f. Speak on Stages
    - g. 506C registration
    - h. REICLUBS
    - i. OREI
    - j. NATIONREI
  2. Investment Advisor
    - a. Inside Sales
    - b. Pitch Man
    - c. Small Groups
    - d. Webinars
    - e. One on One Phone Calls
  3. Investment Coordinator
    - a. Admin
    - b. Paperwork
    - c. Sets up Phone Calls for Investment Advisor