

The Close's Real Estate Investment Business Plan Template

1. Executive Summary

2. Company Description or Overview

3. Mission & Vision Statement

Mission Statement

Vision Statement



4. Investment Strategy

- Wholesale
- Cash-Flow
- Short-Term Rental
- Fix and Flip
- Buy-and-hold
- Crowdfunding
- REITs and real estate funds
- Others: _____

5. Market Analysis

Location: _____

Population: _____

Rental and Vacancy: _____

Long-Term Appreciation: _____

Active Housing Inventory: _____

Overall Market Condition:

6. SWOT Analysis

Internal Business Analysis	
Strengths	Weaknesses
External Business Analysis	
Opportunities	Threats



Business Strategies to Employ Based on SWOT Analysis:

7. Specific & Measurable Goals

Goal 1:

Check if your goals are S.M.A.R.T

Goal 2:

Check if your goals are S.M.A.R.T

Goal 3:

Check if your goals are S.M.A.R.T

Goal 4:

Check if your goals are S.M.A.R.T



Goal 5:

Check if your goals are S.M.A.R.T

8. Financial Plan

- Mortgage
- Hard-money loans
- Federal Housing Authority (FHA) loans
- Personal savings
- Home equity line of credit (HELOC)
- Others: _____
- Private lenders

9. Budget and Financial Projections

Expenses	Revenue	Financial Projections
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



10. Marketing Plan

- Real estate website and landing pages
- Email marketing
- SMS and text message marketing
- Real estate ads
- Social media marketing
- Print marketing materials like flyers and brochures
- Real estate signs
- Others: _____

11. Real Estate Team & System Utilized

Attorney Name & Contact: _____

Real Estate Agent Name & Contact: _____

Contractors Name & Contact: _____

Plumbers Name & Contact: _____

Property Manager Name & Contact: _____

Accountant Name & Contact: _____

Real Estate Investing App: _____

Property Management System: _____

12. Exit Strategy