

# Real Estate Plan Template

Build with Clarity. Move with Discipline.

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Live a Crowned Life

## Current Position

### Current Status

Indicate if you rent, own, or invest currently.

### Available Capital

Funds available for down payment or investment.

### Income Overview

Summarize your monthly income sources.

### Existing Debt

List major debts impacting borrowing ability.

## Investment Objective

### Primary Goal

Cash flow, appreciation, flip, or long-term hold.

### Timeline

Your expected timeframe for this investment.

## Investment Objective

### Risk Tolerance

Low, moderate, or high risk preference.

### Involvement Level

Passive or active management approach.

## Property Criteria

### Location

Target city, state, or market.

### Property Type

Single-family, multi-family, etc.

### Price Range

Your target purchase range.

### Condition Preference

Turnkey, light rehab, or heavy rehab.

## Market Analysis

### Market Trends

Is the market growing, stable, or declining?

### Demand Indicators

Rental demand, job growth, population.

### Comparable Pricing

Nearby property values.

### Estimated Rent

Expected rental income if applicable.

## Financial Analysis

### Purchase Price

Expected purchase price.

### Down Payment

Planned down payment amount.

## Financial Analysis

### Monthly Costs

Mortgage, taxes, insurance, etc.

### Cash Flow Analysis

Income minus expenses estimate.

## Financing Strategy

### Financing Type

Loan type or cash purchase.

### Pre-Approval Status

Approved, pending, or not started.

### Lender Notes

Details or requirements from lender.

## Risk Assessment

### Market Risk

Potential market fluctuations.

## Risk Assessment

### Vacancy Risk

Risk of property being unoccupied.

### Repair Risk

Unexpected maintenance costs.

### Mitigation Plan

How you plan to reduce risks.

## Action Plan

### Next Steps

Immediate next actions.

### 30-Day Plan

Short-term execution steps.

### 90-Day Plan

Medium-term execution plan.

# Decision Reflection

## Alignment Check

Does this align with your goals?

## Concerns

Remaining risks or doubts.

## Decision Readiness

Are you ready to proceed?

## Next Steps

Move forward with clarity and disciplined action.

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