

REAL ESTATE STRATEGY

**LEVEL FOUR**

Financial

A DIVISION OF
LEVEL FOUR GROUP, LLC

Prepared For: _____

Date: _____

RENTAL PROPERTY

Address: _____ Value: \$ _____

MORTGAGE

Outstanding balance	\$ _____	Monthly Payment \$ _____
Rate Structure	Adjustable Fixed	Interest Rate _____ %
Is there a Balloon payment?	Yes No	Balloon Payment \$ _____

MAINTENANCE COSTS

Type of maintenance	Warranty Property Management Company	Self-managed Other	Average Monthly Costs \$ _____
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INCOME

What is the monthly income received from this property? \$ _____

NET PROFIT / LOSS

What is the monthly net profit / loss for this property? \$ _____

OWNERSHIP STRUCTURE

If LLC, how does the LLC file?	Individual	LLC	S-Corp	C-Corp
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PROPERTY GOAL

If goal is to sell Expected sale date: _____ Target Price: \$ _____

If goal is to use a Legacy Device	Estate Tax Issue	Estate Planning Issue	Trust Consideration
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RECOMMENDED NEXT STEPS

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