

Real Estate Investment Business Plan Template

1. Write Your Mission & Vision Statement

2. Conduct a SWOT Analysis

Internal Business Analysis	
Strengths	Weaknesses
External Business Analysis	
Opportunities	Threats

Business Strategies to Employ Based on SWOT Analysis

3. Decide on Your Real Estate Business Model

4. Set Specific & Measurable Goals

Goal 1:

Check that your goals are SMART: S M A R T

Goal 2:

Check that your goals are SMART: S M A R T

Goal 3:

Check that your goals are SMART: S M A R T

Goal 4:

Check that your goals are SMART: S M A R T

Goal 5:

Check that your goals are SMART: S M A R T

5. Write a Company Summary

6. Determine Your Financial Plan

Conduct Additional Financial Calculations

- Gross operating income (GOI)

$$\text{GOI} = \text{Total rent} + \text{Other income} - \text{Vacancy losses} = \underline{\hspace{2cm}}$$

- Capitalization (Cap) rate

$$\text{Cap rate} = \text{Net operating income} / \text{Purchase price} = \underline{\hspace{2cm}}$$

- Gross rent multiplier (GRM)

$$\text{GRM} = \text{Property price} / \text{Gross annual income} = \underline{\hspace{2cm}}$$

- Vacancy rate

$$\text{Vacancy Rate Formula} = \text{\# of Vacant Units} \times 100 / \text{Total \# of Units} = \underline{\hspace{2cm}}$$

- Cash flow

$$\text{Cash flow} = \text{Gross rental income} - \text{Total expenses} = \underline{\hspace{2cm}}$$

7. Perform a Rental Market Analysis (RMA)

Use our free RMA template to create your analysis: [Rental Market Analysis \(RMA\): The Investor Guide](#)

Create a Marketing Plan

8. Build a Team & Implement Systems

- Attorney Name & Contact: _____
- Real Estate Agent Name & Contact: _____
- Contractors Name & Contact: _____
- Plumbers Name & Contact: _____
- Property Manager Name & Contact: _____
- Accountant Name & Contact: _____
- Property Management System: _____

9. Exit Strategy
