



## Investor Script

This is \_\_\_\_\_, I'm doing a survey of local investors... do you have just a couple of minutes for me?

\_\_\_\_\_ (Name), What is your long-range plan for your investment properties (property)? (Name the address if you can)

### **If they plan to keep it -**

- ☉ Are you perhaps looking to add to your portfolio at this time? The interest rates and prices make this a great time to add to your portfolio!
- ☉ When you do invest, are you looking for cash-flow or long-term appreciation?
- ☉ I know some great cash-flowing deals that should appreciate too. Would you like me to send you some samples?

### **If leaving to their children -**

*(Smile)* If you don't mind me asking, how well do your children get along?

- ☉ What if you took the property sold it via a 1031 exchange and put it into two or more trusts where you get all the cash flow proceeds. Then the trust could revert to your child or children upon your death. I'm not a tax expert but it's worked for several of my clients as an estate planning tool and it helps the children learn to invest also.
- ☉ Then there would be no squabbling over who wants to do what with your

# YOUR COACHING MATTERS



*"Success is doing what you said you'd do consistently, with Clarity, Focus, Ease and Grace" -Maria Nemeth*

property.

- Have you considered this as an option?
- Would this make sense for you?

## **If they want to sell -**

Go into the Prequalification Questions

## **Additional question to other investment owners:**

- How satisfied are you with your current property manager?
- We have a very active PM company here...
- Would you like for me to have someone call you or send you some information??