



The Process: Getting Started

- Meet with you to discuss your needs and goals for real estate investments.
- Complete Investor Profile Sheet
- Search for properties that meet your criteria
- Analyze the properties and prepare an Investment Analysis including the “Investment Summary”
- Arrange for property tours (where appropriate)
- Determine which property is the “best fit” for you
- Submit offer and begin Negotiations
- IF requested, the Shepherd Group can assist with attorney selection
- Work with you to determine which form of ownership is best for the client
- After basic agreement (LOI), finalize negotiations on actual contract
- After contract is signed, begin Due Diligence (lease reviews, tenant discussions, property inspections, verify income and expenses, etc.)
- Develop Rent Rolls and “Actual” budget (as opposed to a Proforma)
- Discuss Due diligence findings with the client and if necessary, re-negotiate the terms
- Prepare management transition plan (tenant notices, banking, service contracts, etc.)
- Co-ordinate Accounting and Reporting with you for consistent information flow

For more information contact:

Frank A. Sakelaris

630.416.3311

fsakelaris@shepherd-grp.com

www.shepherd-grp.com

500 East Ogden Avenue, Suite 204

Naperville, IL 60563

