



A Real Estate Investor's Financial Planning Solution

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Co-Founders



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RE Analysis, Partnerships



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Product



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Why Propertyllama?



Who & Where do REI currently go to for RE portfolio help and retirement planning?

NOWHERE

Why Not?

There aren't any platforms out there.

However, there are many for traditional investments.



Hosting A Portfolio Analysis Mastermind Using Propertyllama



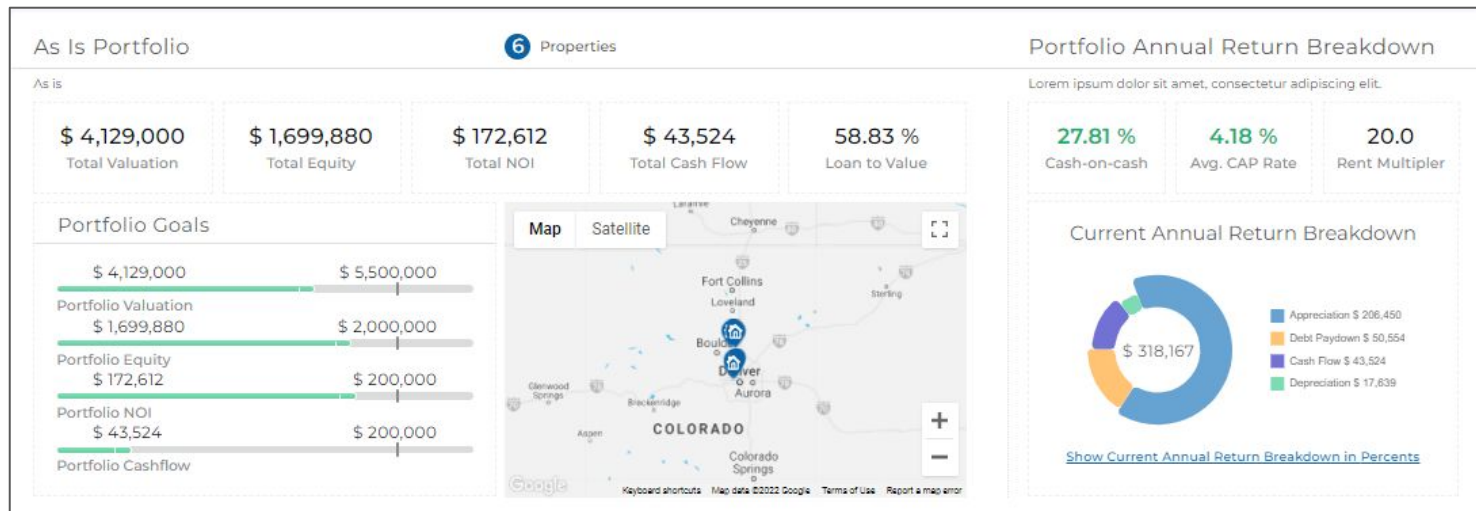
The goal is that clients **walk away with an understanding of your portfolio and a clear action plan as to your next move.**

We'll accomplish this by utilizing local market knowledge, human advisory, and analysis via Propertyllama.

- 1 Organize Portfolio and Identify Goals
- 2 Identify Opportunities
- 3 Create Action Plan



Client Portfolio Growth Plan:



	As Is with 6 Units	Sell 2 Units / Buy 4 Units = 8 Units	Change
Valuation	\$4,129,000	\$4,509,000	+380,000
NOI	\$172,612	\$255,222	+\$82,610
Cash flow	\$43,524	\$93,779	+\$50,255
Results	Owned 6 units / Sold 2 units \$580k proceeds	Added 2 Condo STR & 2 SFH LTR	+2 Door gain

What Does Propertyllama do for REALTORS?

OUTCOME 1:

DO Nothing - Portfolio looks good - client is happy but AMAZING touch point
Annual Portfolio Review - you're top of mind

OUTCOME 2:

Wow - I have so much equity & can pull out cash to buy 1 - 3 more properties
REALTOR - has buy side

Propertyllama does 80% of work done for investor clients

OUTCOME 3:

Need to sell a property & trade-up to a bigger property (BUY & SELL Side)

IT'S NOT IF, IT'S WHEN



Outcomes from the Portfolio Analysis Mastermind



- **Apx. 50 Current Clients & 20 Prospective Investor Clients**
 - Apx. 25 new transactions
 - 20+ cash out refinances
 - Transactions include sell and buy side
- **The software builds client and broker understanding of how to track, measure and optimize their portfolio (grow, leverage, build)**
- **Scenario planning to provide trade-up and new real estate investment opportunities**
- **Software creates a link between the data and real estate investment advice**





waitlist sign up 📌



We want to run Masterminds in other markets with local Agents as partners.

<https://portfolio.denverinvestmentrealestate.com/>

Get in touch at chelsea@propertyllama.com