

## **\*\*Support Resource Material\*\***

The support resource materials will save you hundreds of hours of setup and design of everything from transaction management systems and task management to CRM solutions with Evernote and Gmail. While I could sell this package of support files for \$40 or more on the book website, you get it absolutely free when you buy the book. So, just order the book and send me the shipping confirmation email to [REDeskReference@gmail.com](mailto:REDeskReference@gmail.com) and you'll get the resources free via automated email response.

**Privacy Statement:** I will not sell or share your email or other information with anyone. I will retain your email in case I offer other free resources to purchasers of the book, but will not be sending you emails or selling things. I simply want purchasers of the book to be successful in their real estate businesses.

I will only keep your email address in order to send you any updates or edits to the resource materials.

Here are some screen shots of the spreadsheets and other support materials you'll get access to via email after your book purchase:

## **Investment Calculations Spreadsheets**

<b>Commercial Rental Investment Performance Calculation Spreadsheet</b>									
<b>**IMPORTANT NOTE:</b> Copy this entire set of spreadsheets before using, in case you move things or mess up.									
<b>Property Info</b>									
Address: _____					Type: _____				
Purchase Price ---->		\$500,000			<b>OPERATION COSTS:</b>		Annual Cost		
Down Payment ---->		\$100,000			Management		\$22,000		
Other Acq. Costs -->		\$0			Accounting		\$1,200		
<b>Cash In &gt;</b>		<b>\$100,000</b>			Legal		\$400		
<b>INCOME FROM OPERATIONS:</b>				<b>Potential</b>		<b>Annual Occupied</b>			
<b># of Units</b>		<b>Mnthly Rent</b>		<b>Annual</b>		<b>Occup %</b>		<b>Income</b>	
<b>Calculations</b>									
4		\$ 750.00		\$ 36,000		90		\$32,400	
3		\$ 800.00		\$ 28,800		85		\$24,480	
2		\$ 950.00		\$ 22,800		95		\$21,660	
\$		-		\$ -		100		\$0	
\$		-		\$ -		100		\$0	
\$		-		\$ -		100		\$0	
\$		-		\$ -		100		\$0	
Vacancy & credit loss % as whole #, will convert to % --->						2		\$0	
Gross Potential Income -----				<b>\$87,600</b>				\$0	
Gross Operating Income -----				<b>\$76,969</b>				Total Operating Exp ----> <b>\$39,400</b>	
Gross Rent Multiplier or GRM ---->				5.71				Net Operating Income -> <b>\$37,569</b>	
Cash Flow Before Taxes (CFBT)						Capitalization Rate ->		7.5%	
Net Operating Income ->				<b>\$37,569</b>		ST/Fed Income Tax =		\$7,500	
Enter Debt Service ---->				<b>\$22,000</b>					
Capital Expenditures -->				8000				<b>Cash Flow After Taxes (CFAT) -----&gt; \$9,269</b>	
Coml Performance Calcs   Coml Lease Calcs   Rental Yield Calcs   Investment Calcs Master Sheet   CMA Sheet   (+)									

# Real Estate Agent CRM & Transaction Spreadsheets








**Land Buyer Transaction Task List with Due Dates**

**\*\*IMPORTANT NOTE:** Copy this entire set of spreadsheets before using, in case you move things and mess up!

Task	Days After Contract	Days Before Closing	Due Date
Enter the Contract Date -->			10/6/2016
Enter the Closing Date			12/20/2016
Deliver Pre-deal PA copies to all parties	1		10/7/2016
Deliver initialed PA pages to buyer and file	3		10/9/2016
Procure earnest check from Buyer(s)	1		10/7/2016
Deliver Earnest check and file/transmit receipt	2		10/8/2016
Property disclosure delivery deadline	7		10/13/2016
Deliver property disclosure and all other docs avail.	1		10/7/2016
Road documents delivery deadline	7		10/13/2016
Well Documents delivery deadline	7		10/13/2016
Water Rights Documents delivery deadline	7		10/13/2016
Determine whether client is closing local or remote		14	12/6/2016
Give Client Funding/Wiring Instructions		14	12/6/2016
Property disclosure objections deadline	14		10/20/2016
Road documents objections deadline	14		10/20/2016
Well documents objections deadline	14		10/20/2016
Water rights documents objections deadline	14		10/20/2016
Property disclosure objections resolution deadline	21		10/27/2016
Road documents objections resolution deadline	21		10/27/2016
Well documents objections resolution deadline	21		10/27/2016
Water rights documents objections res. deadline	21		10/27/2016
Well inspection delivery deadline	14		10/20/2016
Set closing time and directions to client		14	12/6/2016
Well inspection objections delivery deadline	21		10/27/2016
Well inspection objections resolutions deadline	28		11/3/2016
Survey delivery deadline		14	12/6/2016
Survey objections delivery deadline		7	12/13/2016
Survey objections resolution deadline		1	12/19/2016
All objections resolution deadline		1	12/19/2016

Agent Expense | Income Funnel | CMA Sheet | Residential Seller Transaction | Residential Buyer Transaction | Land Seller Transaction | **Land Buyer Transaction**

# Text Files for CRM and Two eBooks

Name ↑	Owner	Last modified
 Gmail Contact Record.txt	me	Mar 25, 2017
 InvestLikeGurus.pdf	me	Mar 25, 2017
 RTM Land Buyer Task List.txt	me	Mar 25, 2017
 RTM Land Seller Task List.txt	me	Mar 25, 2017
 RTM Res Buyer Task List.txt	me	Mar 25, 2017
 RTM Res Seller Task List.txt	me	Mar 25, 2017
 The Ultimate WordPress Real Estate Website.pdf	me	Mar 25, 2017

# Evernote CRM & Transaction Utilities

Templates - jimkimmons@gmail.com - Evernote  
 File Edit View Note Format Tools Help

New Note All Notes Sync Vertical Mortgage Sites

Search notes

Viewing 4 notes in Templates

Reminders (1)

Add reminder to "Templates"

Transaction Tasks Templ... 2/14/2017

Transaction Tasks Template

3/26/2017 NOTE: Change these tasks and add and delete as needed for the different transaction types. All you have to do is to copy this base note back to...

Contact Info

3/25/2017 Contact/Prospect Basic Information  
 Name Address Work Phone Cell Phone Contact Type Buyer Prospect, Seller Prospect, Title/Attorney

Buyer Prospect

3/25/2017 buyer list Name Address Work Phone Cell Phone Home Phone Investment Strategy(ies) Property Type(s) Price Range Area(s) of Interest Val...

Seller Prospect

3/25/2017 Name Address Work Phone Cell Phone Home Phone Property Type(s) Home, Unimproved Land, Improved Land Home Square Footage Chara...

Transaction Tasks Template

Tahoma 12 a B I U

**NOTE: Change these tasks and add and delete as needed for the different transaction types. All you have to do is to copy this base note back to the same folder or folder of choice and then edit it. Rename your new note with a search Buyer Transaction Tasks, etc. Then when you actually use the template for a deal, copy it again, change the "ClientName" Transaction, and fill in the due dates.**

Mark Completed	Task	Due Date	Completed
<input type="checkbox"/>	Deliver Pre-deal PA copies to all parties		
<input type="checkbox"/>	Procure earnest check from Buyer(s)		
<input type="checkbox"/>	Deliver Earnest check and file/transmit receipt		
<input type="checkbox"/>	Copies of signed purchase agrmt to all parties		

You may choose to just use these instead of working with the due and completed dates. However, filling away a detailed record of when things were handled could be valuable if problems develop.

Change as needed for your area/transactions. Easiest to just not enter a due date for those you don't intend to use or do not need. Or, you can delete the row after you've copied into the transaction. You can change the template to take care of future transactions. To delete a row, put cursor on the row and right click for a delete option.

This is the actual contractual delivery or due date. You don't have to worry about reminders. Each time you pull up this transaction list, you can set a new "Scheduled" date to review this list and handle the next due item before it is due.

**When you complete the item, use these hot keys to auto-insert a date/time.**

Mac: Cmd + Shift + D  
 Windows: Alt + Shift + D

The information here is not selling anything, though I recommend purchasing some products or services in articles, but receive no compensation if you do. What I want is for users to find this book to be a valuable tool in learning about what makes a real estate agent successful. I lean toward free and inexpensive solutions that will get the job done but not kill you with overhead costs.

Thanks for purchasing the Real Estate Agent's Desk Reference. I hope you profit from it.

Jim Kimmons