

Building Wealth With Notes Workshop

November 17-19, 2017

Agenda

FRIDAY, November 17, 2017 8:30am-6:00pm

Introduction and Welcome

PART 01: NPN OVERVIEW

What are Notes?

Why Notes?

Note investment market and opportunity

Why do banks sell?

Note process overview

PART 02: HOW TO FUND NOTE PURCHASES

How to fund your Notes in Creative Ways

*** GUEST SPEAKER: Jennifer Maldonado on Raising Private Capital**

LUNCH

PART 03: HOW TO FIND AND EVALUATE NOTES

Where to find Notes

Evaluating candidate Notes

Purchasing the Note

***Guest Speaker: Buddy Broome and the Financial Calculator**

SATURDAY, November 18, 2017 8:30am-6:00pm

***Guest Speaker: Kaaren Hall, Founder uDirect IRA Services**

PART 04: HOW TO SECURE YOUR INVESTMENT

Evaluating candidate Notes

Perfecting the Note Title

Performing Due Diligence

LUNCH

PART 05: HOW TO WORK-OUT YOUR NOTE

RESPA et. al. are your friends

Your Team, and why have them?

Note Purchase and Sale Agreement

Collateral Documents

Note Work Out

Reinstatement

Forbearance agreement (Loan Modification)

Short sale

Deed-in-lieu (Cash for Keys)

Foreclosure

Other options

PART 06: SCALABLE NOTE POOL EXAMPLE

OPTIONS ON WORKING TOGETHER AND WITH OTHERS

SUNDAY, November 19, 2017 8:30am-6:00pm

In the Home Stretch...

PART 07: HANDS-ON ACTUAL NOTE ANALYSIS

- Note Analysis Tool
- Reviewing and Evaluating an Actual Tape
- Hands-On Due Diligence
- Comps Sheet
- O&E Report Analysis
- Reviewing a Collateral File

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***GUEST SPEAKER: Brent Kesler on Infinite Banking—how to be our OWN Bank to buy Notes and everything else in your life!**

PART 07 (CONTINUED): ROLL PLAY AND HANDS ON DUE DILIGENCE

PART 08: CONCLUSION