



# **THE PAPER BROKER WORKSHOP**

## Legal Information Is Not the Same as Legal Advice

This book provides information about real estate investing, private money borrowing, lending, and/or brokering. It is designed to help users safely determine their own legal needs. Please understand that legal information is not the same as legal advice. The application of law varies with an individual's specific circumstances. Laws vary from state to state and are in constant change, and although we do everything we can to make sure our information is accurate and useful, we recommend you consult a lawyer if you want professional assurance that this information, and your interpretation of it, is appropriate to your situation.

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## Notes as an Investment

- Benefits of the note business
- Types of notes
- Note creation and terminology
- Performing notes
- What to do with a note
- Four Rules of the note business

Notes:

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## Finding Notes

What we'll cover in this section:

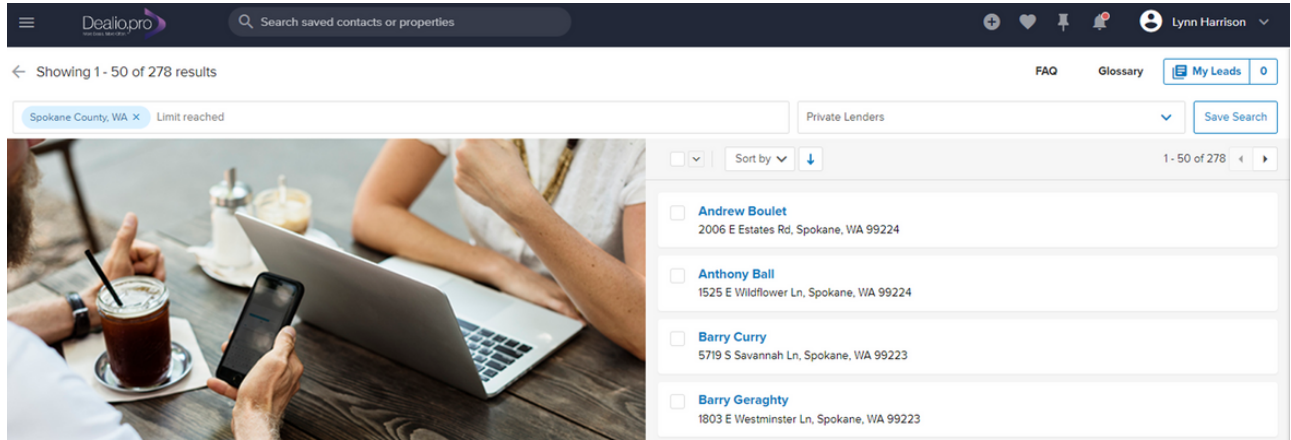
- Marketing
- Where to find notes
- Rule of 55
- Dealio.Pro and lender searches
- Building your business with local, performing notes

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Dealio.Pro

Search an area to find and market to private lenders



Notes:



**Paper Broker Box**



Subject to underwriting and funding

**1st Lien**

Minimum 15% yield on 1st lien,  
subject to underwriting

**2nd Lien**

Minimum 30% yield on 2nd lien,  
subject to underwriting

**Type**

Property Type:  
Residential 1-4 units

**House**

Size of House:  
2800 sq ft maximum

**ARV**

Price: ARV  
Not to exceed FHA cap

**Features**

Property Features: 5 bedroom /  
3 bathroom maximum

**Property**

Size of Property:  
½ acre maximum

Notes:

## Rule of 55



Notes:

## Analyzing Notes

What we'll cover in this section:

- Due diligence
- Value of property
- SendFuse
- Underwriting documents
- Grading paper
- Note performance
- Discounting

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## Getting the Deal

What we'll cover in this section:

- Calculating yield
- Understanding note terms
- Making an offer
- The buying process
- Purchasing contracts and agreements

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**Real Estate Master IIIx**

Available to download from the Apple Store and Android App on Google Play. Also available on Amazon.com as a handheld calculator.



Notes:

## Selling Your Note

What we'll cover in this section:

- Steps to brokering
- Alternative note buyers
- Selling your note with The Paper Brokers
- Closing costs
- The Paper Box
- Note buying/ selling resources

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Things to do as soon as I finish this workshop to start my paper broker business:

Things to do within 30 days:

Things to do within 60 days:

Things to do within 90 days:

**Part 1:** If you have invested in Dealio.Pro, conduct private lender searches in your region (if you are not investing in Dealio.Pro, visit your County Records Office online or in person and search for lenders. Look for entities that appear to be private lenders). Pick a property financed by a private lender and do some research.

**Notes:**

**Part 2:** If you have invested in SendFuse, practice running a property search and title report on a nearby property . Take some time to review the capital stack. Then continue conducting due diligence with Google and Zillow.

**Notes:**

**Part 3:** How will you make the Rule of 55 work for you to market your note-buying business? What actions can you take right now?

**Part 4:** Download to your computer and review all the documents from your Paper Broker Workshop Back Office. Make sure you read the disclaimer. Print when you are ready to use (remove the disclaimer before using with clients). Practice using the call scripts.

