

2017 BREGGIO LAW OFFICE FORMS & VIDEO FEE LIST

COMBO PACKAGE DEALS

SAVE

P1	ALL FORMS AND VIDEOS	\$3,995	\$1,165
P2	ALL VIDEOS	\$795	\$205
P3	SELLER FINANCING PACKAGE (F1, F2, V5, V6, & V7)	\$1,195	\$392
P4	WHOLESALING PACKAGE (F3, F4, F5, V1, V2 & V3)	\$1,095	\$387
P5	REAL ESTATE INVESTOR PACKAGE (F8, V1, V10, V11 & V 12)	\$395	\$196

FORM PACKAGES (Word docs)

F1	Seller Financing Forms	\$895
F2	Lease Option Forms	\$395
F3	Wholesaling by Assignment Forms	\$295
F4	Wholesaling by Trust Forms	\$495
F5	Wholesaling by LLC Forms	\$395
F6	Hard Money Loan Forms	\$995
F7	"Pocket Lender" Forms	\$495
F8	Investors Package	\$195
	Individual forms not sold separately	\$4,160

INDIVIDUAL VIDEO/AUDIO EDUCATION (video & audio files, approx. 90 min each)

V1	The Reasl Estate Purchase Contract	\$99
V2	Wholesaling Essentials	\$99
V3	Advanced Wholesaling	\$99
V4	Beginning Asset Protection	\$5
V5	Seller Financing Essentials	\$99
V6	Advanced Seller Financing	\$99
V7	Lease Options	\$99
V8	Advanced Asset Protection	\$5
V9	Hard Money Lending	\$99
V10	Holding Rentals	\$99
V11	Flipping Properties	\$99
V12	Final Issues in Real Estate Investing	\$99
		\$1,000
V13	Successful Partnering	\$99
V14	Self-Direction Master Class (Coming May 2018)	

Course and Forms Descriptions

COURSES

Real Estate Investing Summer School

We designed our 12-course summer school to cover all the basic topics of real estate investing! While they are meant to be watched in order, you can purchase a single class, all of them as group, or even purchase the classes along with the forms that we cover in one of our specific investing packages! The classes are video files with slide presentations of about 90 minutes each.

Course 1: Real Estate Contracting

Just about everything in real estate must be done by a written agreement. Whether you're purchasing, wholesaling, flipping or landlording, everything is based on a CONTRACT. This course helps you understand the basics of contracting law and uses the purchase contract as an example. This class forms the basis of all other classes in the Summer School. Here's what you'll learn:

1. Basic contracting principals
2. The real estate purchase contract, generally
3. The Utah REPC as an example—line by line analysis
4. Earnest money & disputes
5. How to create appropriate Addenda
6. How to legally cancel the contract
7. Breaches of a real estate contract, specific performance & damages

Course 2: Wholesaling Essentials

Wholesaling is one of the faster growing segments of real estate investing as it doesn't require any money or a lot of experience to do. But, there are a lot of issues, both legal and transactionally, that every investor should know! This class teaches you the basics of wholesaling and prepares you for our more advanced wholesaling class (Module 3). Here's what you'll learn:

1. The Wholesaling Contract
2. The Utah REPC as a wholesaling contract
3. The Assignment Addendum
4. The Utah assignment addendum
5. Making changes to the Contract or Assignment
6. The assignment fee
7. Tips to insure a smooth closing

8. What if final buyer can't perform
9. What if seller doesn't perform
10. Licensing rules and other tax and legal issues

Course 3: Advanced Wholesaling

Once you understand the contractual basis of how to assign a contract, you are ready to take it to the next level. There are times when you cannot simply assign your purchase contract. Experienced investors have learned how to use "disposable" LLCs and "asset" trusts (sometimes called "land" trusts) to wholesale a property without changing the named buyer on the purchase contract. Here's what you'll learn in this class:

1. Using a trust to wholesale
2. Using a disposable LLC to wholesale
3. Advanced tips on wholesaling

Course 4: Beginning Asset Protection

Watch this class before you hire any lawyer to create your asset protection entities! The point of investing in real estate is to build your assets! But, why build something you don't protect? And real estate can become a BIG target to snooping lawyers. Many inexperienced investors don't think about protecting the business they've created. This class explains how every investor, not matter how novice, can protect themselves in the event of lawsuits and other problems. You can follow this class up with our Advanced Asset Protection Class (Module 8). Here's what you'll learn:

1. Types of liability
 - a. Personal
 - b. Professional
2. Types of protection
 - a. Corporate veil
 - b. Charging order
3. The Limited Liability Company
4. Adding Privacy
5. Maintaining your protection

Course 5: Comparing Three Seller Financing Techniques

Everyone wants a seller financed deal. And there are many ways to structure them. This is the first of 3 classes on seller financing. Here, we compare traditional seller financing v. the contract for deed v. lease options. We then go over traditional and lease option techniques in more detail in the next two classes. This class can also be watched AFTER you watch Modules 6 and 7. Specifically, here is what you'll learn:

1. Overview of types of seller financing deals
2. A comparative analysis of:
 - a. Seller Financing deals (traditionally through a note & deed)
 - b. Contracts for Deed
 - c. Lease Options

Course 6: Traditional Seller Financing

This class teaches you the way most seller financing deals have typically been done. These are situations where the buyer takes title and the seller become a lender under some kind of note and deed. It is also helpful to watch our Hard Money class (Module 9) to help you understand notes and deeds. Here's what you'll learn in this class:

Topics:

1. The "True" seller financing deal: where seller owns the property outright and loans the purchase price through a note and deed.
2. The "All-Inclusive" deal, or Wrap: where there's a mortgage and an "all-inclusive" note and deed
3. The "Subject-to" deal: where the buyer simply takes over the seller's mortgage payments

Course 7: Lease Options

While you may not think of lease options as seller financing, they are a way of getting the property while the seller is still involved, as a landlord. This is also the basis of the "sandwich" lease option that experienced investors do. These can be tricky and you need to understand which side of the transaction you're on because they are done differently! Also, at the end of the class, we review the different types of seller financing again to really help you understand the differences! Here's what you'll learn in this class:

1. The lease option from a buyer's side
2. The lease option from a seller's side
3. The lease sandwich – The Master Lease
4. Exercising the option
5. Hurdles in conventional financing out of option
6. Review of all seller financing techniques

Course 8: Advanced Asset Protection

Don't be fooled by lawyers selling you great big packages of complicated legal protection documents! That's not the way to protect yourself. And we find that most don't even know how to use those forms. As a beginner, the basics are enough. But as your assets and portfolios grow, you'll want stronger protective tools. This is the class for you!

1. The Series LLC (many states now have them!)
2. Use of the Asset Holding trust (a great privacy tool!)
3. The Family Limited Partnership (an extra layer of protection!)
4. The “Property Management” LLC (helps to spread risk!)
5. Partnering with a “Corporation” (for those single people!)

Course 9: Private and Hard Money

You don't have to be a lender to need this class! Every investor will borrow from a private or hard money lender at some point. Or, you may have family and friends that want to loan you money. This class will help you really understand the different kinds of loans and arrangements you might need. Here's what you'll learn:

1. Defining private and hard money
2. The Standard Note and Deed
3. The Shared Appreciation Note and Deed
4. The All-inclusive Note and Deed
5. The Fractional Note and Deed
6. The Notice of Interest
7. Foreclosures, deed in lieu

Course 10: Holding Rentals and Landlording

The basis for almost every real estate investor is the rental property. In this class we cover all the basic issues that an investor needs to know in order to become a good landlord. From vetting your tenants to preparing for lawsuits, here's what you'll learn in this class:

1. The Series LLC (the new way to protect your rentals)
2. Deeds of Conveyance
3. The Lease Agreement
4. Other Rental Documents
5. Security Deposits
6. Evictions
7. Pets & Disabilities (Section 8 housing)
8. Repairs
9. Working with Property Managers (or become a “property manager”)
10. Insurance & taxation
11. Avoiding and preparing for law suits

Course 11: Flipping and Contractors

Looking to build up cash in order to buy a rental? Flipping is a great way to do that! But, there are many things you need to understand first. This class will help you get started in flipping. Here's what we'll cover:

1. The "S" Elected LLC
2. Taxation of flips
3. The contractor agreement and scope of work
4. Releases of lien
5. Mechanic's Liens
6. Working with and controlling contractors

Course 12: Other issues in real estate investing

You'll never stop learning in real estate investing. In Modules 1 – 11 we covered all the basic areas of real estate investing. This class goes further with additional topics that are rarely covered. While some of these are more advanced, even beginning investors should understand them if they really want to grow their business! Here are some of the topics:

1. Bankruptcies
2. Probates
3. Title Insurance
4. Partnering
5. Self-direction
6. Raising money in real estate
7. 1031 Exchanges

FORMS

Seller Financing Forms: This packet of forms contains specialized contracts for seller financing deals as well as the ancillary documents all investor should have in this kinds of transactions. These forms go with our Seller Financing Video Education series as well. Further, you may also need loan documents in our Hard Money Package of forms if you're creating your own note and deeds.

1. Seller Financing Contract – No underlying mortgage
2. Seller Financing Contract – Subject to transactions
3. Seller Financing Contract – Wrap transactions
4. Seller's Acknowledgement – Extra protection and details on the due on sale clause
5. Specific Power of Attorney
6. Lender Letter
7. Insurance Letter

Lease Option Forms: This packet has all the documents for lease sandwich and option transactions. You can learn about the forms in our Seller Financing Video Education series. Here's what's included:

1. Option to buy – Seller side
2. Option to buy – Buyer side
3. Affidavit of Option
4. Option Assignment
5. Lease Agreement – Master
6. Lease Agreement – Tenant

Wholesaling Forms: There are 3 separate packages of forms for wholesaling deals, depending on your focus. The “By Assignment” forms are for assigning contracts. But advanced investors will also wholesale by “Disposable LLC” or “Asset Trust” when they can’t assign the contract.

By Assignment Package

1. Simple purchase agreement
2. Assignment agreement
3. State form language to make state forms assignable
4. Addendum to purchase agreement
5. Addendum to assignment agreement
6. Escrow agreement
7. Cancellation notice

By Asset Trust Package

1. Asset Holding Trust
2. Beneficiary Assignment – Transfer
3. Beneficiary Assignment – Wholesale
4. Beneficiary Assignment – Purchase
5. Appointment of Co-trustee
6. Resignation and Appointment of Trustee
7. Certificate of trust

By Disposable LLC Package

1. Disposable LLC Certificate
2. Disposable LLC Operating Agreement
3. Member Interest Transfer – Wholesale
4. Member Interest Transfer – Purchase
5. Manager Change forms

Private Lending Forms: This is the complete package of note and deed forms for the private lender or investors needs all kinds of notes. It includes:

1. Standard Note & Deed
2. Fractional Note & Deed
3. All-Inclusive Note & Deed
4. Shared Appreciation Note & Deed

And these additional lending forms:

1. Bridge Loan Certification
2. Personal Guarantee
3. Note Modification
4. Payment Letter
5. Note & Deed Assignment
6. Loan Assumption Agreement
7. Deed in Lieu
8. Notice of Interest
9. Release of NOI
10. Subordinated Deed of Trust
11. Trust Deed short form
12. Lending Payoff Letter
13. Lender's Commitment Letter
14. Payoff Calculator

Pocket Lender Forms: This package is designed for creating simple notes and deeds. It is ideal if you have friends and family that want to loan you money and you need the documents.

1. Standard Note & Deed
2. Payoff Letter
3. Payoff Calculator

Investors Forms: This package is designed to provide the base documents for both holding rentals properties and flipping homes.

Landlording Forms

1. Guide to Better Landlording
2. Rental Application
3. Tenant Checklist
4. Lead Based Paint Disclosures
5. Lead Paint Pamphlet
6. Deposit Reservation
7. Tenant's Authorization
8. Lease Agreement
9. Interim Occupancy Agreement
10. Pet Addendum
11. Pool Waiver
12. Assignment of Lease
13. Novation of Lease
14. Tenant Notice & Acknowledgement
15. Landlord Repair Authorization
16. Termination and Release

17. Eviction & Vacate Notice
18. Owner's Property Management Agreement

Flipping Forms

1. Guide to Working with Contractors
2. Contractor Agreement
3. Contractor Payment Addendum
4. Contractor's Lien Release
5. Request for Bid
6. Scope of Work and Change

Title Forms

1. Quit Claim Deed
2. Warranty Deed

Utah State Forms (Free Inclusion)

1. Utah REPC (2017)
2. REPC Addendum
3. Seller Financing Addendum
4. Assumption Addendum
5. Assignment Addendum
6. Seller's Disclosures
7. 1031 Exchange Addendum
8. FHA/VA Addendum
9. Lead Based Paint Addendum
10. Lead Based Paint Disclosure
11. Buyer's Notice of Cancelation
12. New Construction Contract
13. Utah Lease Option
14. Multiple Offers Addendum