

REAL ESTATE INVESTING SUMMER SCHOOL

You will receive an intensive, 12-Course education over about 12 weeks. You will receive 18 hours of recorded educational materials and homework to complete prior to class. You will then meet for 2.5 hours, twice a month over a three-month period for a total of 6 live classes. The syllabus and schedule will be released 4-6 weeks before the first class. The classes are LIVE and will be held at Breglio Law Office.

SYLLABUS

Course 1: Real Estate Contracting: Basic contracting principals, the RE purchase contract, the Utah REPC, earnest money & disputes, creating addenda & making changes, canceling the contract, breaches of contract and preparing to enforce it.

Course 2: Beginning Wholesaling: The wholesaling contract, assigning Utah REPC, assignment addendum, making changes, assignment fee, closing tips, buyer breach, seller breach, licensing and other tax/legal issues.

Workshop: Exercises in creating and modifying real estate contracts for purchase and wholesale.

Course 3: Advanced Wholesaling: Using a trust to wholesale, using a disposable LLC to wholesale, wholesaling, other advanced wholesaling techniques and issues.

Workshop: Exercises in creating wholesaling documents.

Course 4: Beginning Asset Protection: Personal & Professional liabilities, corporate and charging order protections, the LLC as a protection tool, adding privacy, maintaining your protection for the long haul.

Course 5: Intro to Seller Financing: Overview of seller financing deals, contracts for deed & lease options, pros and cons, analysis and legal issues.

Course 6: Three Ways to Seller Finance a Deal: True seller financing, the all-inclusive & the subject-to deal, best practices and 30 tips to do it right.

Workshop: Exercises in creating seller financing documents.

Course 7: Lease Options: LOs from the buyer's side, from the seller's side, lease sandwich, the master lease, the option, exercising and assigning the option, hurdles and solutions in exit strategy.

Course 8: Advanced Asset Protection Strategies: The Series LLC, asset holding trusts, the family limited partnership, the "property management" deflection strategy, equity stripping, "self" partnering.

Course 9: Private and Hard Money Loans: Private lending, the note and deed, understanding a title report, recording position, other types of notes and deeds, notice of interest, foreclosing, deed in lieu.

Workshop: Exercises in creating loan documents & lease options.

Course 10: Holding Real Estate: Holding title, deeds of conveyance, clouds, leasing, other rental documents, security deposits, evictions, pets & disabilities, Section 8 housing, insurance, avoiding and preparing for the eventual lawsuit.

Course 11: Flipping Real Estate: Taxation of flips, liability & insurance, contractor agreements, working with subs, mechanic's liens, releases, Utah state construction registry, the scope of work and making changes.

Course 12: Final Issues in Real Estate: Bankruptcy, probates, title insurance, partnering, self-direction, raising capital, other legal issues.

BONUS COURSE: Seller Financing Financing: An in-depth exploration of the numbers behind complex seller-financing deals.

INCLUDED REAL ESTATE FORMS

- **Seller Financing Forms:** 1) Seller Financing Contract (for use in all seller fi's, all-inclusive's and subject-to's), 2) Lease Option, 3) Master Lease, 4) Tenant Lease, 5) Option Assignment and 6) Due on Sale Affidavit, 7) Lender/Insurance forms, 8) POA
- **Wholesaling Forms:** 1) Simple Purchase & 2) Assignment Agreement, 3) Wholesaling Trust, 4) Assignment of Trust Beneficial Interest, 5) Appointment/Change of Trustee Forms, 6) Disposable LLC Certificate, 7) Sale & Purchase of LLC, 8) Manager Appointment/Change Forms
- **Hard Money/Private Lending Forms:** Escrow Instructions, Notes & Deeds for: 1) Standard Loans, 2) Fractionalized Loans, 3) All-Inclusive Loans, 4) Shared Appreciation Loans, as well as 5) Lender Commitment Letter 6) Notice of Interest Form and 7) Reconveyance of Deed & Release Forms
- **Investors Package:** 1) Rental Application, 2) Lease Agreement & Summary, 3) Eviction Notices, 4) Damage/Cleaning Evaluation, 5) Tenant & Landlord Duty Addenda, 6) Repair Request, 7) Pet Addendum, 8) Lead Paint Disclosure & Information Pamphlet, 9) Lease Assignment, Notice & Release, 10) Lease Termination & Release, 11) 30-day Move Out Notice, 12) Contractor Agreements, 13) Indemnification, 14) Contract Release & Waiver, 15) Scope of Work, 16) Change of Scope Form, 17) Property Management Agreement