

# Commercial Investing CHECKLIST



It's important to determine your criteria for commercial investment *and stick to it*. Over time, your parameters, geographic reach and budgets will likely expand, but the best investors can always come back to this anchor document to frame how, where and in what they're investing time, talent and resources.

Using this checklist will help you best articulate your investing strategy while giving you a solid foundation for comparing commercial properties.

## PROPERTY SIZE

### *Residential*

- ☐ 2-4 units

### *Commercial*

- ☐ 1-5 units  
☐ 5-20 units  
☐ 21-50 units  
☐ 50-100 units  
☐ 100+ units

## PROPERTY CLASS:

- ☐ Class A  
☐ Class B  
☐ Class C  
☐ Class D

## DESIRED MARKET(S):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

"Immediate market:" \_\_\_\_\_

Well-known market (i.e. where you grew up, where you work, family hometown, etc)

\_\_\_\_\_

Other relevant market(s) to you, personally

\_\_\_\_\_

PRICE RANGE

- ☐ Under \$250,000
- ☐ \$250,000 - \$500,000
- ☐ \$500,001 - \$1,000,000
- ☐ \$1,000,001 - \$1,500,000
- ☐ \$1,500,001 - \$2,000,000
- ☐ \$2,000,001 - \$2,500,000
- ☐ \$2,500,001+

STABILIZED/VALUE ADD

- ☐ Stabilized
- ☐ Value Add
- ☐ Occupancy below 80%
- ☐ Fully Vacant/Repositioned

MARKET TYPE

- ☐ Primary
- ☐ Secondary
- ☐ Tertiary
- ☐ Emerging

MARKET/NEIGHBORHOOD CLASS

- ☐ Class A
- ☐ Class B
- ☐ Class C
- ☐ Class D

MANAGEMENT APPROACH

- ☐ Self-manage
- ☐ Onsite management (hired)
- ☐ Property management (third party)

**NOTES:** \_\_\_\_\_

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