

# Building Wealth With Notes Workshop

July 20-22, 2018

## Agenda

### FRIDAY, July 20, 2018 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

**\*BONUS HANDS-ON: Calling County Tax Collectors**

### LUNCH

#### PART 03: HOW TO FIND AND EVALUATE NOTES

Where to find Notes

Evaluating candidate Notes

Purchasing the Note

**\*BONUS: HANDS-ON/ROLE PLAY - How to Call Local Realtors for Their Help**

**\*Guest Speaker: Daniel Singer, Singer Law Group on Notes in Bankruptcy Court**

### SATURDAY, July 20, 2018 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, July 20, 2018 8:30am-6:00pm**

**In the Home Stretch...**

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

**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

**LUNCH**

**PART 07 (CONTINUED): ROLE PLAY AND HANDS-ON DUE DILIGENCE AND NOTE EVALUATION**

**PART 08: CONCLUSION**