

12 Month - Consulting Services Scope of Work Addendum # _____

Company: _____ (hereinafter “Company”)

Consultant: Crown Investor Institute, LLC (hereinafter “Consultant”)

Upon execution this *Consulting Services Scope of Work* it shall become an Addendum to that certain Consulting Agreement (the “Agreement”) executed between the parties on _____ and is considered incorporated into and a part of that Agreement by reference.

Definition of the Service: A one-year (6 month minimum) consulting agreement where topics are defined by the Company (see below for recommendations from Consultant). This Addendum includes certain document packages including the customized property management agreement and owner housekeeping, ancillary and entity documents, Broad Standing Disclosure, managing 3rd party relationships, owner side revenue streams and asset vs property management documents; customized lease, tenant housekeeping and ancillary documents, and tenant revenue streams; Scope of Service package; consulting time helping the Company implement the new strategies and documents; numerous training videos; access to Robert for calls regarding time-sensitive events Company needs assistance with; plus access to the Subscribers Dashboard and attendance to any workshops Consultant holds.

Executing a One-Year Consulting Plan

When talking to new clients it’s often hard to answer the question “where do we go from here?” The following is our way of laying out a proposed 12-month plan for **putting our shoulder behind your company** for a year and unloading all we know about this business. The price includes the cost of many of our most popular forms and documents PLUS help implementing them. These 12 months would accelerate your company to the next level and make you a lot more money.

There are four of us contributing to this effort. Robert addresses the customized PMA, lease and other legal strategies and revenue streams. Denise helps with implementing revenue strategies and the business side. Tony helps with the technology side. Attorney Monica Gilroy addresses ANYTHING YOU WANT TO TALK ABOUT. Each month (or two) we’ll identify different topics to address and go deep into that topic for as long as needed.

We think building a customized management agreement and lease is the priority because they drive the rest of your management system. You can change out and reprioritize anything you like based on your sense of what the priorities are for your company. Our experience is **the foundation of your business is the PMA so that should be first**, then the revisions (or review) of your lease and ancillary documents. You can change this around any time.

Here is a partial list of topics we can go into during this Addendum. After six months you can pause, quit or continue until you feel you’ve gotten out of all you can get. Many continue under our coaching program which is \$200 a month for time on YOUR priorities and needs.

Dealing with Owners

Building a Customized (Killer) Management Agreement

- Build a customized PMA (or revise your existing document)
- Build housekeeping (CYA) documents
- Build ancillary documents
- Build entity documents
- Add owner side revenue streams
- Clarify (or build a) Scope of Service
- Managing 3rd Party Relationships
- 54 training videos – NOT AVAILABLE TO THE PUBLIC
- \$1,200 worth of document downloads
- Asset Manager vs Property Manager
- Broad Standing Disclosure
- You can only use 90% of our PMA (unless you're in Georgia) because your model is different than ours and your state landlord tenant laws are different. So, we'll read your landlord tenant laws carefully and collaborate with you to tweak our agreements to match your model and state laws

Building a Scope of Service

- Identifying previously established 3rd party relationships
- Defining asset management vs property management
- Creating a job description for the property manager

Revenue generators for owner side

Strategic revenue generators for owners

Preventing owners from doing maintenance

Lease without management documents

Build an owner handbook

Tenant Placement (without management)

Revenue Sharing

You'll discover tons of revenue streams in the normal course of our document packages and time together. There are several revenue streams we can't reveal in our general course of counseling because they generate so much revenue we can't charge enough for them to be properly compensated. When the time is right we'll share them, help you implement them at no cost, and split the revenue for a while if it works in your model. This way you run no risk of paying for something you can't use and we are compensated proportionate to your success with the strategy.

Dealing with Tenants

Building a Customized (Killer) Lease Agreement

- Build a customized lease (or revise your existing document)
- Build housekeeping (CYA) documents
- You can only use 90% of our Lease (unless you're in Georgia) because your model is different than ours and your state landlord tenant laws are different. So, we'll read your landlord tenant laws carefully and collaborate with you to tweak our agreements to match your model and state laws.
- Build ancillary documents
- Add tenant side revenue streams
- \$900 worth of document downloads

- Video training – NOT AVAILABLE TO THE PUBLIC

Service animals and comfort pets

The 5 year lease

Build a tenant handbook

Doing remote move-ins

Managing move-out disputes

Revenue generating strategies for the tenant side

Building qualifying guidelines that prevent discrimination

Tenant retention for bigger profits

Profiting from Maintenance

6 ways to profit on maintenance

Rehab, Renovation, Restoration Revenues

Make money on ALL maintenance

Vendor agreements

Vendor revenue generators

Dealing with Staff

Tools for hiring the right people

Hiring virtual assistants

Spoiling the staff and keeping them

Dealing with the Property

Profiting on property visits

Managing mold claims

Scheduled maintenance options

Dealing with Business

Tweaking your financial statements

Building a referral business

Tracking your business stats

Getting more out of your company pre-tax

Getting the annual reports right

Balancing trust accounts

Getting ready to sell your company

Review office tech systems

SEO / website customer service automation

Managing threats of (and actual) litigation

Setting up Other Businesses

Maintenance company

Lease purchase profits

Rent Recovery (post move-out collections)

Technology

Every couple years you need a full technology audit to better inform your team with the newest options available for running your business. We have on staff a real estate agent with 11 years' experience building websites. He manages four servers, is a reseller with Go Daddy, can setup all the Amazon products including EC2 hosting

on solid state drives, plus all the G Suite Google Business Apps. He has coded over 120 WordPress themes and holds multi-site licenses with the most popular plugins in the industry saving you thousands of dollars per year.

Technology audit of your basic hardware and software solutions

Speed and security testing of your firewall and office systems. Verify your backups work

Verify that your company brand is rightly reflected on your social media accounts

Full audit of your website, domain, hosting and mobile platforms

Audit and report on your company's online content: tags, visual presentation, dead links, etc

SEO baseline is created using 30 searches for your company using 6 search engines (180 total)

Discuss methods for increasing your SEO without spending monthly dollars

Discuss possible marketing campaigns using your website, social media and online groups

Audit and report on your public reputation with strategies for getting lots of great reviews

A National Service Charity Proposal

Imagine if your company sponsored a local 501 (c)(3) project, received sponsor checks from you vendors, had hundreds of people visiting your website for donation and registration, included volunteer energy from local groups like school bands, scouting groups and church youth to make a difference in the lives of people in your immediate community. Your company would get great publicity, build staff cohesion and create positive news coverage while driving hundreds of unique eyes to your website. We have done this and had great success in the past. It's a custom charity project designed around your company culture, connections and community. We highly encourage you to consider this as part of your collaboration with us.

A Month with Monica

Attorney Monica Gilroy has coached and mentored us for 20 years and is a landlord tenant litigator. She developed all our documents and kept us out of trouble. We co-author workshops and co-teach class together. One of your months you can have two one-hour calls with her and you get to define the agenda.

Compensation: \$500.00 a month paid in advance on the 1st of each month.

Term: 12 months (6 month minimum) beginning _____ but Company can terminate with 10 day notice **after the first six months.** If you join us mid-month we prorate the second month's payment. Document packages are sent when we attack a specific topic together, not the first month you're with us. You pay nothing extra for document packages while you're under this consulting agreement.

Agreed to this ___ day of _____, 20____.

COMPANY: _____ **CONSULTANT: Crown Investor Institute, LLC**

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