

12 Month Consulting Services Scope of Work

Addendum # _____

Company: _____ (hereinafter "Company")

Consultant: Crown Investor Institute, LLC (hereinafter "Consultant")

Upon execution this *12 Month Consulting Services Scope of Work* it shall become an Addendum to that certain *Consulting Agreement* (hereinafter "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 (cancel at any time) consulting agreement where topics are defined by the Company (see below for recommendations from Consultant). This Addendum includes two consulting conversations per month.

Some clients already use our documents (or are downloading them as they go along) and want us to help them implement new strategies, revenue streams and document packages. This is a take it step at a time and let's see where it goes option and is our way of **putting our shoulder behind your company** for a year and taking it to the next level.

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 management agreement so that should be first**, then the revisions (or review) of your lease and ancillary documents. You can change this around any time.

Attached is a partial list of topics we can go into during this Addendum. Many clients continue beyond the 12 months because they benefit so much from the strategies they learn. **Our time will be spent on YOUR AGENDA not ours. You alone will direct the topics and conversation.**

Compensation: \$500.00 a month paid in advance on the 1st of each month (with a late fee of \$50 if payment is not received by the 5th and \$100 if not received by the 10th).

Term: 12 months (cancel anytime) beginning _____ and either party can terminate at any time. If you join us mid-month we prorate the second month's payment or wait until the first of next month.

Agreed to this ___ day of _____, 20___.

COMPANY: _____

CONSULTANT: Crown Investor Institute, LLC

X _____

X _____

its _____

its _____

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
- 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.
- Asset Manager vs Property Manager
- Broad Standing Disclosure
- 54 training videos – NOT AVAILABLE TO THE PUBLIC
- \$1,200 worth of document downloads

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 an agent on staff with 11 years of experience building websites.

Technology audit of basic hardware and software solutions

Speed and security testing of firewall and office systems.

Verify backups work

Verify 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