

# Real Estate Trends: What to Expect in 2021







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## Agenda

- 1 About Entrust
- 2020 Real Estate Trends with Neal Bawa
- Real Estate IRA Basics
- Streamline Property Management with a Self-Directed IRA
- Q&A Time





#### Meet Your Host

#### Bill Neville

Business Development Manager at The Entrust Group





Years at Entrust



Educating people on investing in alternative assets with an IRA



B.S. in Finance from Penn State University



### About Entrust













### About Entrust





#### About Entrust



- Self-Directed IRA administrators
- Knowledgeable Staff with CISP designations
- Nationwide offices
- National CE program
- In-person events and webinars
- Annual IRA Academy





### Stay Connected



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An investment in knowledge pays the best interest.

- Benjamin Franklin





## REAL ESTATE OPPORTUNITIES SPARKED BY COVID



#### Meet Neal

President and CEO, Grocapitus



#### Neal Bawa

CEO & Founder





#### **ABOUT NEAL**

- Neal's companies have owned / managed a portfolio of over \$320 Million
- Over 2,300 units of Multifamily and Student housing, in 9 states
- Nationally known Multifamily mentor and speaker
- About 5,000 investors attend his Multifamily webinar series and hundreds attend Multifamily Boot camps
- Co-founder of the largest Multifamily Investing Meetup in the U.S. with 10,000+ members.

#### **KEY FOCUS**

Investor Management

Leasing and Tenant Marketing

Submarket and Property Selection

Operations and Metrics

### Sample of Grocapitus Portfolio & Track Record



#### **Equinox at Knight**

This well maintained value-add 194 unit project in suburban Atlanta is in a submarket with incredible schools, This asset is now stabilized and distributed cash.



#### **Equinox on Prince**

Purchased March 2019, our first property in Tucson, AZ is an older 114 unit property in a growth area with new medical centers and malls nearby. Under market rents and tired units offer a true value-add opportunity. We've boosted occupancy by 10% in our 1st month as we re-brand and renovate to create a modern apt community.



#### **The Falls at Crismon Commons**

New 240-unit A class property in highgrowth metro Mesa, AZ. Development includes allocation of 40 vacation rentals and 200 long-term rentals architected to maximize income and profits.

Ground-up construction commences Q2 2020 with completion expected by Q3 2022.



217 units ground up construction next to transit and BNMC medical university campus in Buffalo, NY.

Started construction July 2019, for Q1 2021 completion.



#### **Woods Cross Flex**

Short-term 6 building industrial shovel ready project with a projected 3 year exit. Fully zoned/entitled, all entitlement risks removed consisting of 207K SF Industrial Park, 27K SF Storage Yard for parking, loading dock space, with 2 buildings preleased. Fully subscribed.



#### **Storage Depot**

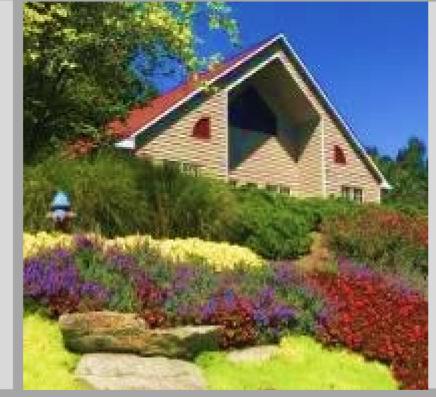
718 unit value-add storage facility with adjacent land for expansion. We will rebrand and reposition it as a green facility by adding two solar arrays to power the entire complex, more climatized storage units, RV parking, as well as an EV charging station. Fully subscribed.





#### **Lakewood Oaks**

Our first project in Jacksonville FL is a 138-unit Class C (vintage 1974) in an emerging Class B area, acquired in Feb 2019. With under market rents, and no renovated units, this is a true value add. We will re-brand it, reposition it, then explore the possibilities to build 32 additional units.



#### **Park Canyon**

151-unit Class B Property in Dalton GA, Chattanooga Metro. Under market rents and 20 down units from a fire gives us opportunity to add significant value in this project.

Property purchased November 2018.



#### **Coyote Creek Apartments**

116-unit new construction multifamily in St George UT, a city with 2% vacancy rate, and the property is zoned for vacation rentals as well.

Construction starts Sept 2019, for completion Q1 2021.

AND MANY MORE...

# Grocapitus Review: Sarah L, Repeat Investor



It's rare to have a syndicator update us so regularly. Grocapitus is a breath of fresh air. They do things differently and way better than their competitors. Thank you Neal for being an amazing leader to your team! I couldn't be happier with the results so far. Looking forward to investing more in the future."

- Sarah L

# Grocapitus Review: Ivan Z, Repeat Investor

"I've invested in 6 of Neal's projects. As I write this, we just had the first successful exit.

Overall, I am very impressed by Neal's approach. It's all about the numbers. He uses public and private data to find the fastest-growing metros in the US in terms of individuals income, new jobs creation and inflow of people. Then he narrows down to towns that have steady employment, good cap rates, and a shortage of rentals. He vets every project carefully before jumping into it. His presentations of each project are packed with meaningful, down-to-earth facts and calculations.

### Two Cents From Our Lawyer

Please Read

- We are not investment advisors, and this seminar is provided for educational purposes only.
- All investments involve different degrees of risk. You should be aware of your risk tolerance level
  and financial situations at all times.
- You are free to accept or reject all investment recommendations made by us. All services that we
  offer are subject to market risk and may result in loss to your investment.
- As you know, a recommendation is not a guarantee for the successful performance of an investment and we cannot guarantee against losses arising from market conditions.
- Do not invest your money on our recommendation alone. Consult a professional advisor.
- HOUSEKEEPING Recording? Questions?



Let's Explore 6 Weekly Indicators on Economic Progress

## 11.8M



**TRACKER #1: JOBLESS CLAIMS** 

Initial claims for unemployment insurance

Weekly in 2020, seasonally adjusted

7M
6M
5M
4M
3M
2M
1M

Jan Feb Mar Apr May Jun Jul Aug Sep

SOURCE: Department of Labor. Data is seasonally adjusted and through September 26, 2020. The Department of Labor began using a new seasonal adjustment methodology the week of August 29.

CONTINUED CLAIMS
IN WEEK ENDING OCT2

1.4M

CONTINUED CLAIMS
ONE YEAR AGO

Rebound can't happen until people return to work and claims recede from record high



Let's Explore 6 Weekly Indicators on Economic Progress



115.7

CONFIDENCE HIGH
BEFORE THE PANDEMIC

89.8

CONFIDENCE LEVEL FOR SEPT 2, 2020

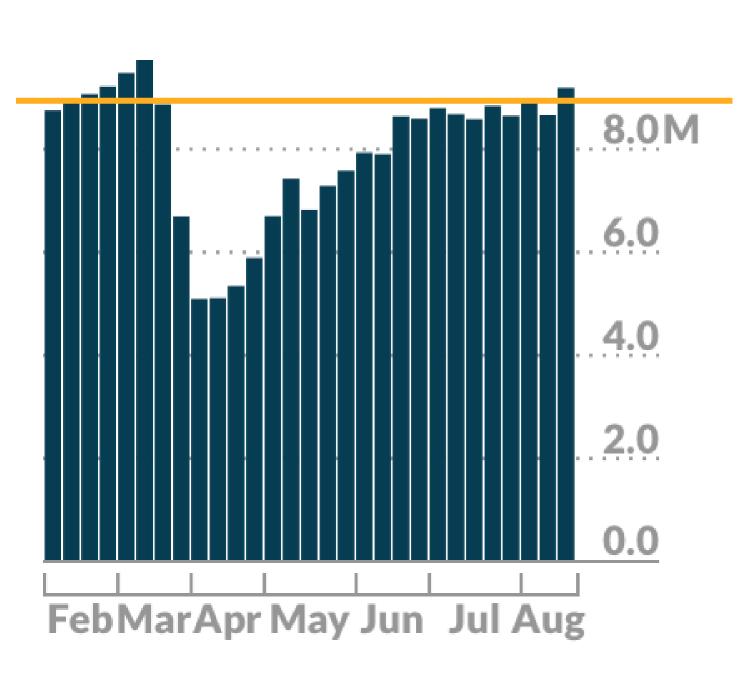


#### **TRACKER #2: CONFIDENCE**

- Optimism suffered a record plunge
- Americans won't regain confidence or spend normally until a vaccine is available and return to jobs.
- This may slow recovery of economic confidence



Let's Explore 6 Weekly Indicators on Economic Progress



8.9M

AVG. WEEKLY BARRELS
SUPPLIED TO GAS STATIONS

49%

**IMPROVEMENT**FROM MAR-APR LOWS

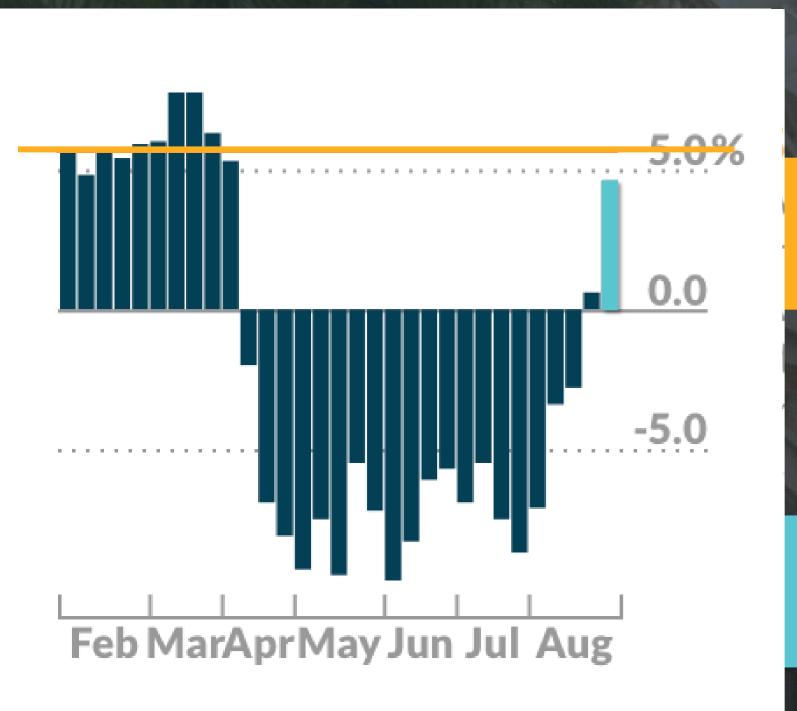


#### **TRACKER #3: GASOLINE**

- Producers slashed production as stay-at-home orders caused Americans to drive less
- More people driving longer distances would be a strong sign of economic recovery



Let's Explore 6 Weekly Indicators on Economic Progress

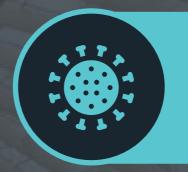


5.6%

**SAME-STORE SALES**AVG. WEEKLY AUGUST 2020

4.6%

**SAME-STORE SALES** FROM AUGUST 2019

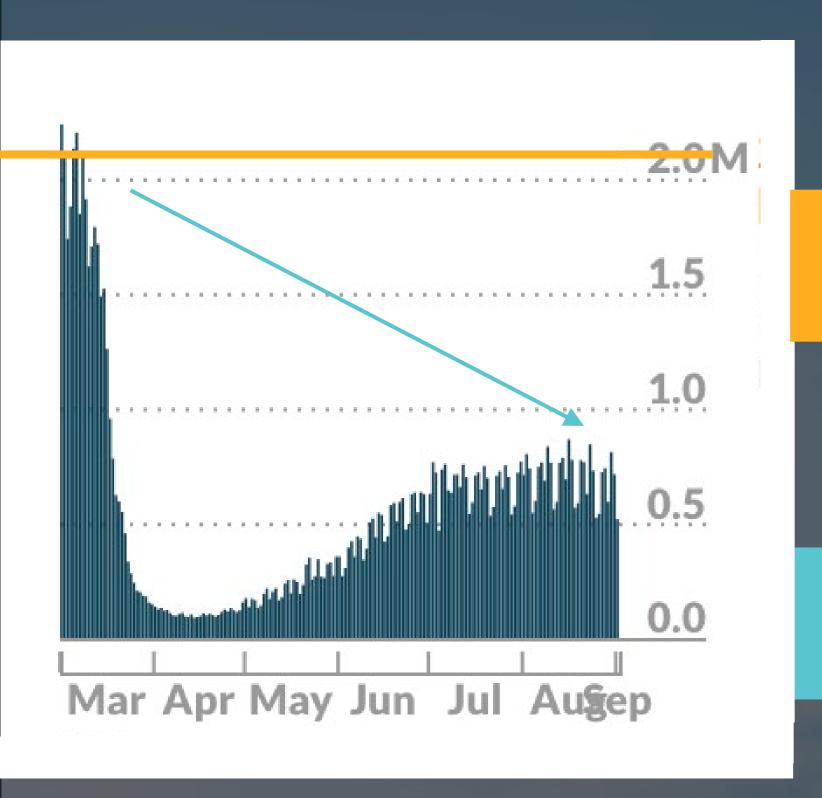


#### **TRACKER #4: RETAIL SALES**

- Retail chains large and small walloped by COVID-19 with sales fell hard when stores closed
- Social distancing likely to keep some people away, but we are seeing improvement
- Change in shopping habits, focused more on eCommerce



Let's Explore 6 Weekly Indicators on Economic Progress



2.1M

DAILY AVG. PASSENGERS
BEFORE PANDEMIC

-75.4%

DROP IN PASSENGERS
FROM TSA AVERAGE



#### **TRACKER #5: AIRLINES**

- U.S. airports look haunted
- International flights likely remain restricted, but a steady increase in domestic travel would suggest Americans feel safer and more confident in the economy



Let's Explore 6 Weekly Indicators on Economic Progress





# MORTGAGE APPLICATIONS WEEKLY CHANGE VS SEPT 2019



#### **TRACKER #6: HOME PURCHASE**

- Pent-up demand, reprioritizing of housing needs and record-low interest rates is bolstering home sales
- The accelerated change in housing needs together with record low interest rate has pushed new home sales to the highest level since 2007

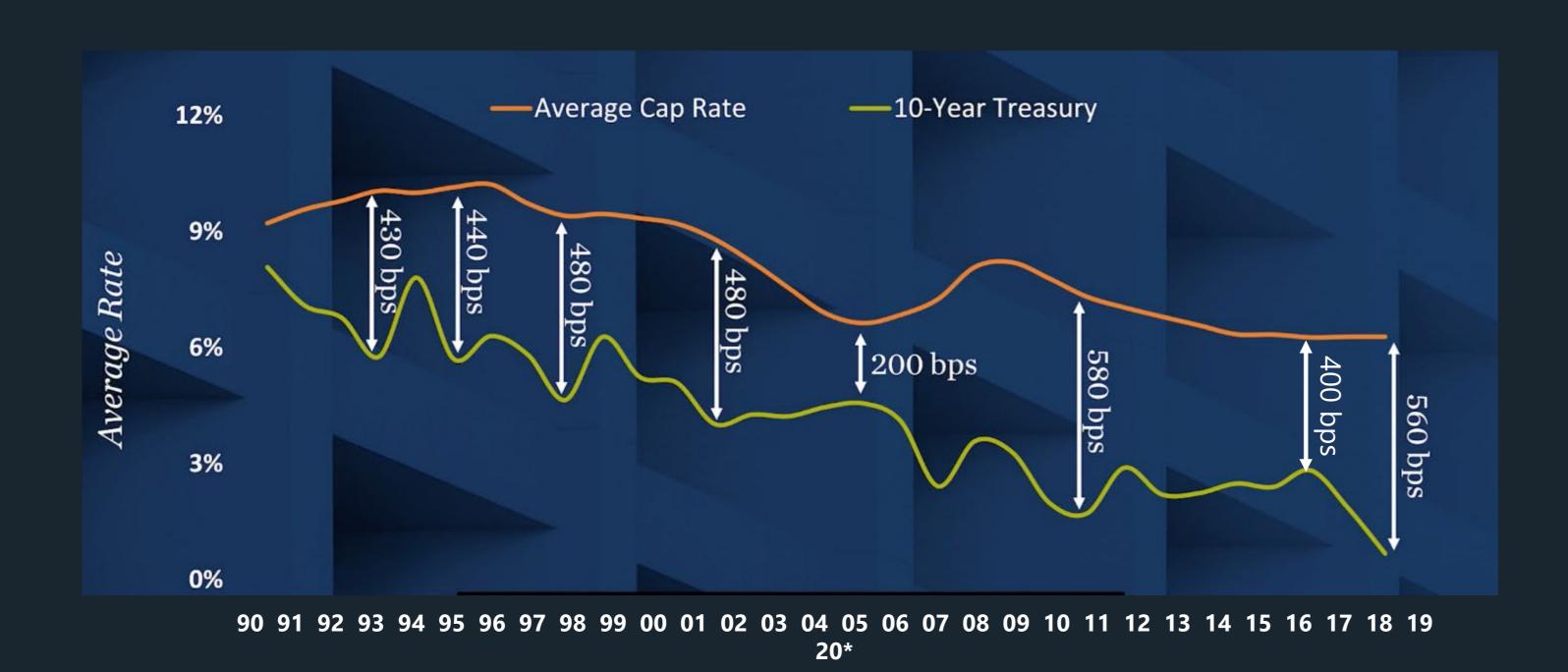




### 2020: TRENDS IN THE REAL WORLD

Impact of the COVID-19 Health Crisis

### Low Interest Rates: Unique Window of Opportunity



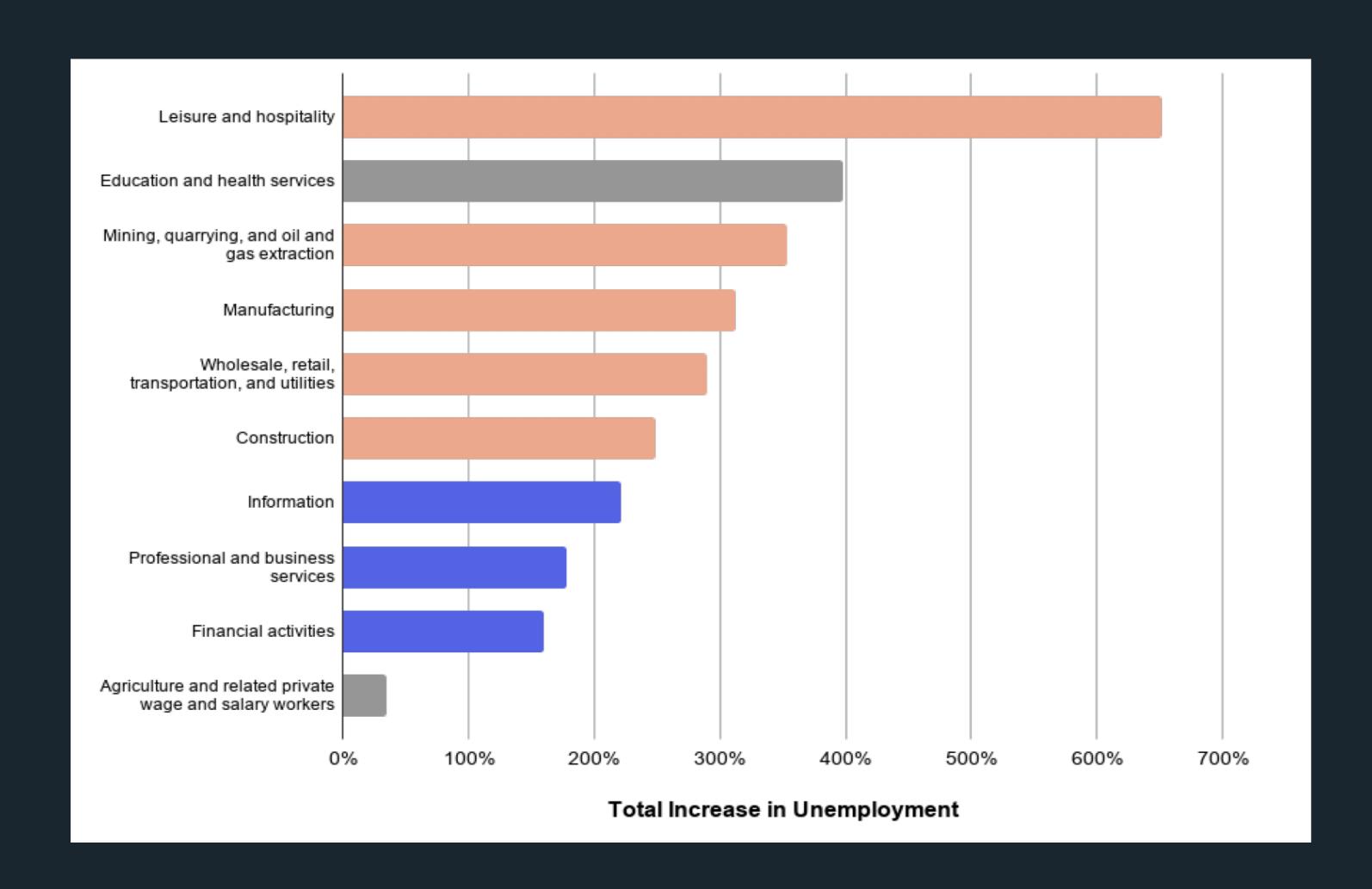
#### **LOOKING FORWARD**

DRIVERS UNDERPINNING REAL ESTATE DEMAND REMAIN SOUND

- Many investors are on sidelines, waiting for market clarity to emerge
- While these investors wait, others are reinventing their strategies to capitalize on emerging trends and historically low interest-rates
- In fact, the spread between cap rates and interest rates are at their second widest spread on record. This yield premium represents a unique window of opportunity for investors



### Megatrend #1 – Uneven Job Losses



- Professional and financial services fared relatively well
- Cyclical sectors such as leisure, hospitality, retail, and construction were decimated
- Non-cyclical sectors also hard-hit including: education and healthcare services, and manufacturing
- Oil and gas under severe pressure due to demand shock coinciding with dissolution of OPEC supply agreement



## Megatrend #2 – Employment: Cities Least Impacted

Ranking	City	Employment Change (Y-O-Y September)
#1	Salt Lake City, UT	-1.5%
#2	Austin, TX	-2.6%
#3	Phoenix, AZ	-2.9%
#4	Dallas-Fort Worth, TX	-3.3%
#5	Indianapolis, IN	-3.3%
#6	Atlanta, GA	-3.8%
#7	Denver, CO	-3.8%
#8	San Antonio, TX	-4.0%
#9	Kansas City, MO	-4.0%
#10	Tampa-St. Petersburg, FL	-4.4%
#11	Houston, TX	-5.2%
#12	Louisville, KY	-5.4%
#13	Nashville, TN	-5.5%
#14	Cincinnati, OH	-5.6%

**<5.7%** 

# Unemployment decline





# Megatrend #2 - Employment: Cities Semi-Impacted

Ranking	City	Employment Change (Y-O-Y September)
#15	Washington, DC	-5.7%
#16	St Louis, MO	-5.9%
#17	Baltimore, MD	-6.1%
#18	Miami, FL	-6.4%
#19	Milwaukee, WI	-6.5%
#20	Charlotte, NC	-6.8%
#21	Chicago, IL	-6.9%
#22	Seattle-Tacoma, WA	-7.1%
#23	Minneapolis-St. Paul, MN	-7.1%
#24	Raleigh, NC	-7.2%
#25	San Jose, CA	-7.4%
#26	Columbus, OH	-7.4%
#27	Philadelphia, PA	-7.4%
#28	Sacramento, CA	-7.6%

5.7-7.6% Employment decline





# Megatrend #2 - Unemployment: Cities Most Impacted

Ranking	City	Employment Change (Y-O-Y September)
#29	Fort Lauderdale-West Palm Beach, FL	-7.6%
#30	Pittsburgh, PA	-7.7%
#31	Portland, OR	-7.9%
#32	San Diego, CA	-8.0%
#33	New Haven-Fairfield, CT	-8.2%
#34	Northern N.J, NY	-8.3%
#35	Orlando, FL	-9.6%
#36	Cleveland, OH	-9.6%
#37	Los Angeles-Orange County, CA	-9.6%
#38	Detroit, MI	-9.9%
#39	San Francisco-Oakland, CA	-10.0%
#40	Boston, MA	-10.3%
#41	Las Vegas, NV	-12.5%
#42	New York City, NY	-13.5%

> 7.6%
Employment decline







### EVICTION APOCALYSE: CRISIS AVERTED?

CDC Issues Nationwide Temporary Halt on Evictions Amidst Pandemic

### Eviction Ban: Nationwide Halt Until Dec 31



- WHY? To avoid a wave of evictions one month after the expiry of several local and state eviction moratoriums, and additional jobless benefits in CARES Act.
- **GOAL?** Offer housing stability to 40 million renters citing risk to public health.
- ✔ HOW LONG? Protection applies through Dec. 31 for qualifying tenants who fill out a form and deliver it to landlords
- Landlords who violate the ban will face criminal penalties. Meanwhile, they have no way of recouping unpaid rent. Evictions for reasons other than unpaid rent are allowed.



### **Eviction Ban:** No Consideration for Landlords

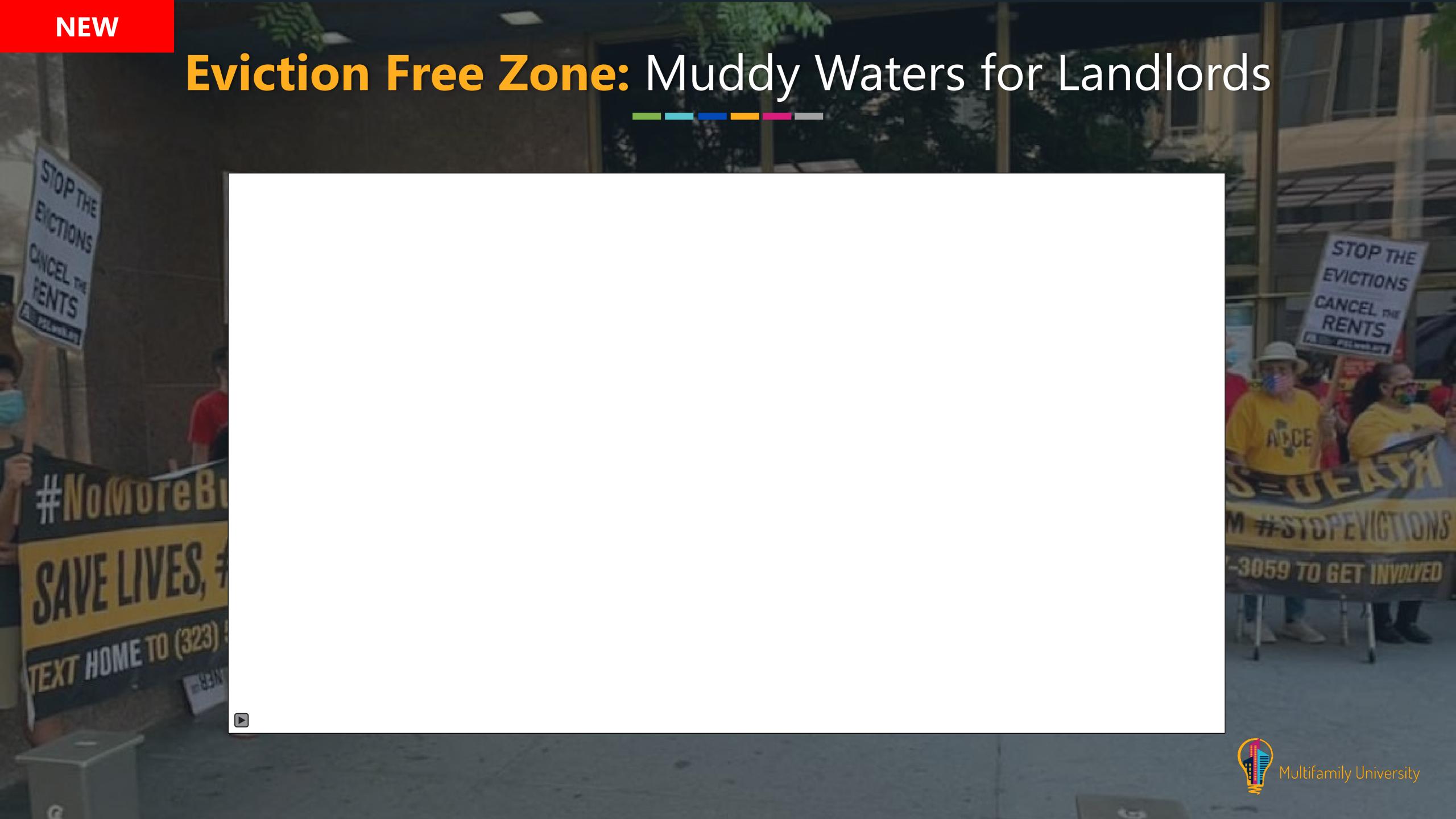


With this new moratorium, some landlords in this country will end 2020 without having received rent for 9½ months, and there's absolutely nothing to be done about it.

STREET STREET

— David Howard, Executive Director





# Domino Effect: Is a Housing Crisis Looming?



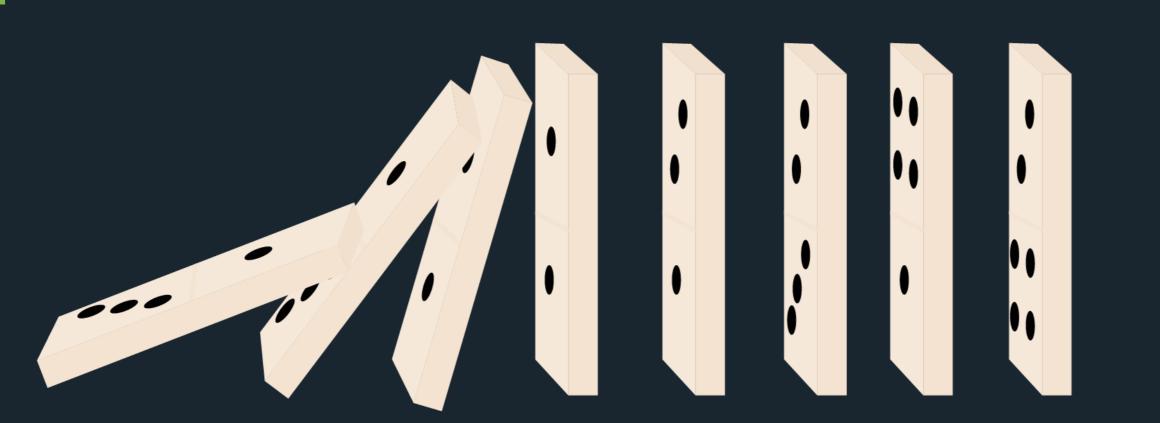
#### WHAT DO WE NEED?

- Emergency rental assistance
- Additional unemployment benefits

#### **START**

Renters Unable To Pay Rent





#### **END**

Owners Losing Properties
On A Significant Scale



HOUSING CRISIS



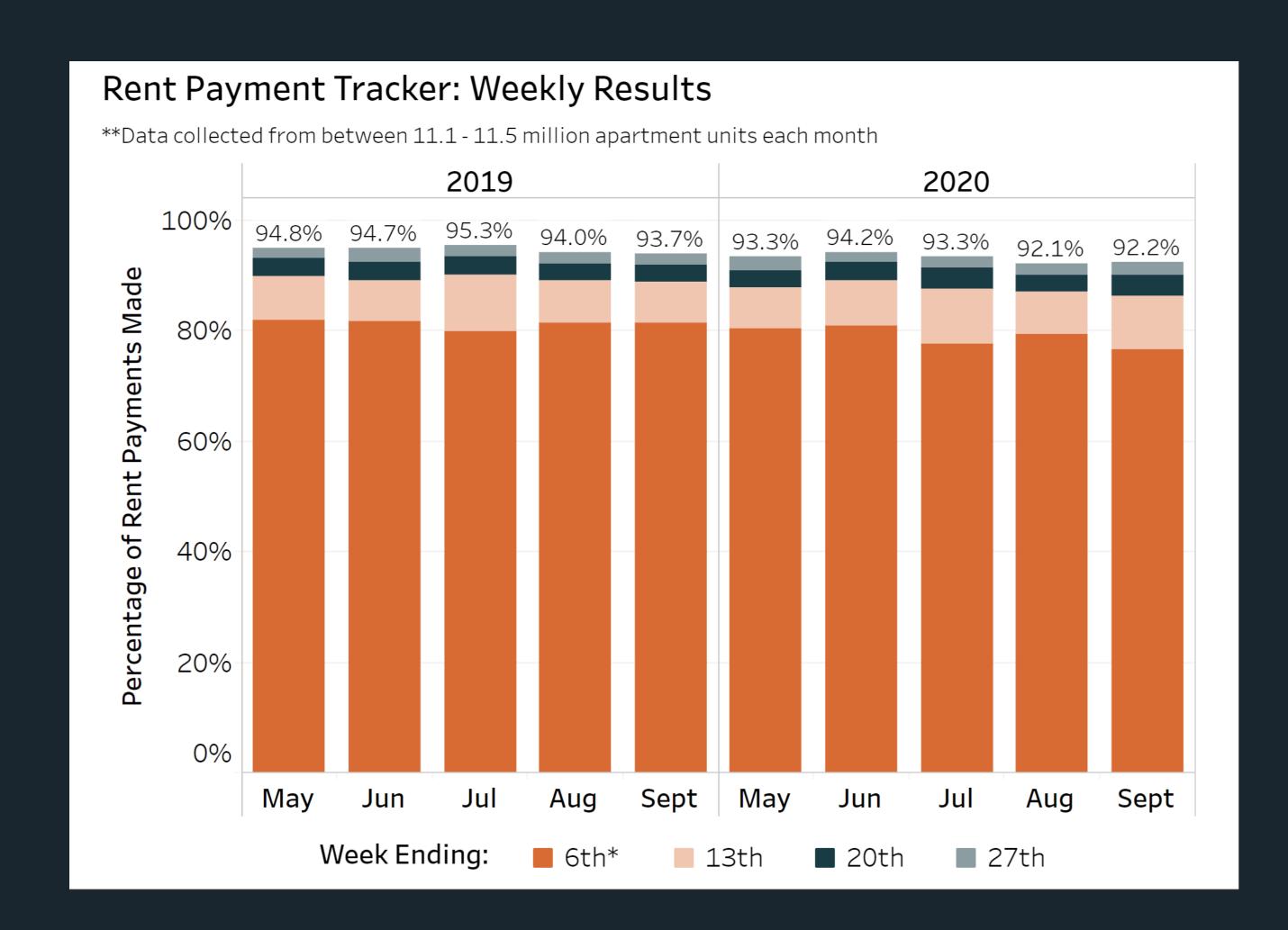
### CA New Evictions Law: Supersedes Federal



- State law supersedes CDC federal order
- No income cap
- Runs through Feb 1, not through Dec 31
- WHAT? Bans evictions based on unpaid rent between Mar-Aug and requires tenants to pay 1/4 of rent between Sept 2020 and Jan 2021 to prevent court-ordered evictions
- LANDLORD RIGHTS? The law does not cancel unpaid rent and landlords can pursue debt in civil court in Mar 2021. Struggling landlords with <5 properties may receive some relief under CARES</p>

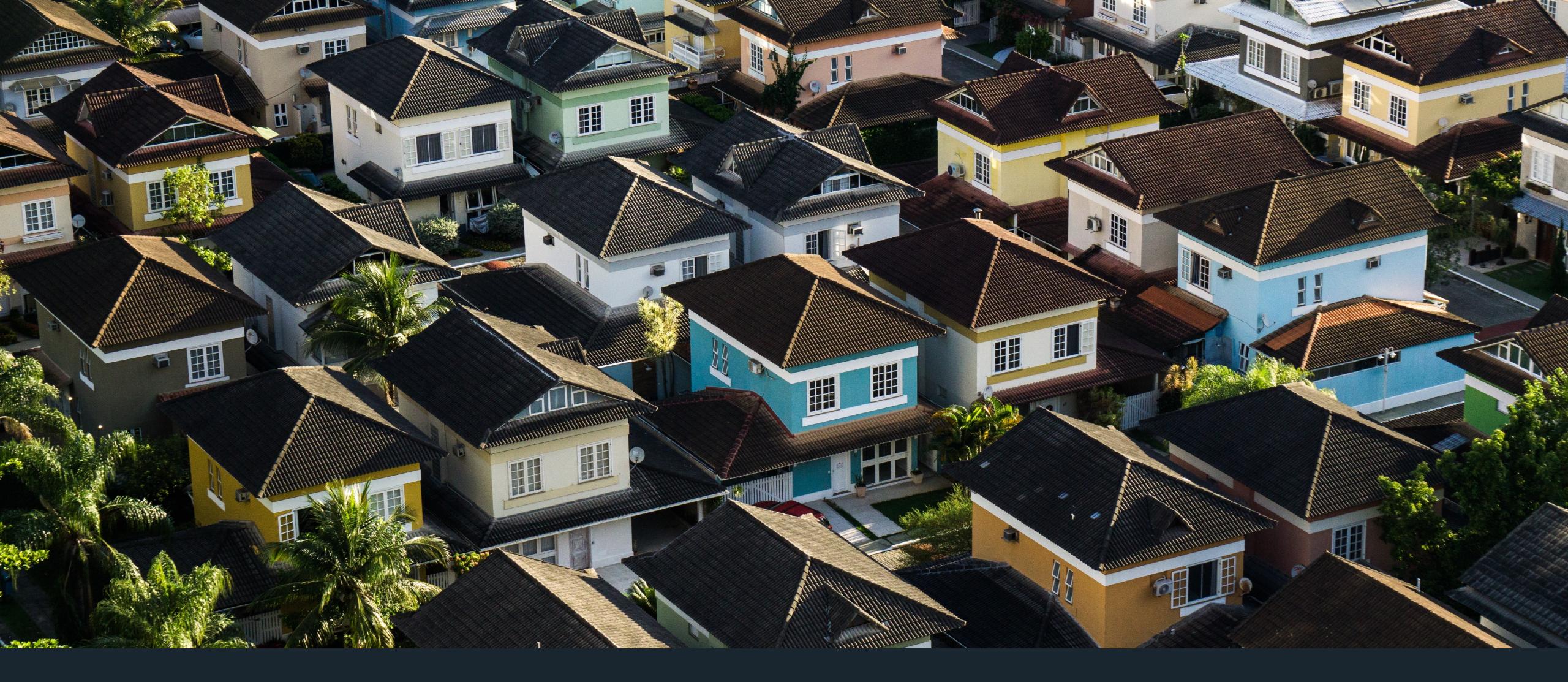


### Rent Collections: Steady Does It



- Collections for Sept until Sept 27 reported at 92.2%
- Expanded federal unemployment benefits provide financial support for renters in short-term
- Many owners paused rent increases and offered renewals at flat rates to maintain occupancy
- Rent growth may fall in 2020 depending on how COVID containment impacts economic recovery
- Rent growth pause will be temporary and may set the stage for outsized gains over the next few years as rent realigns with historical growth trends



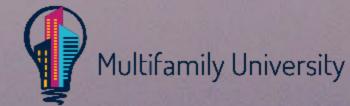


#### **MEGATREND #4: SUBURBANIZATION**

Shifting Attitude About Urban Living As Households Relocate



# Suburbia Mania: Biggest Exodus in 50 Years



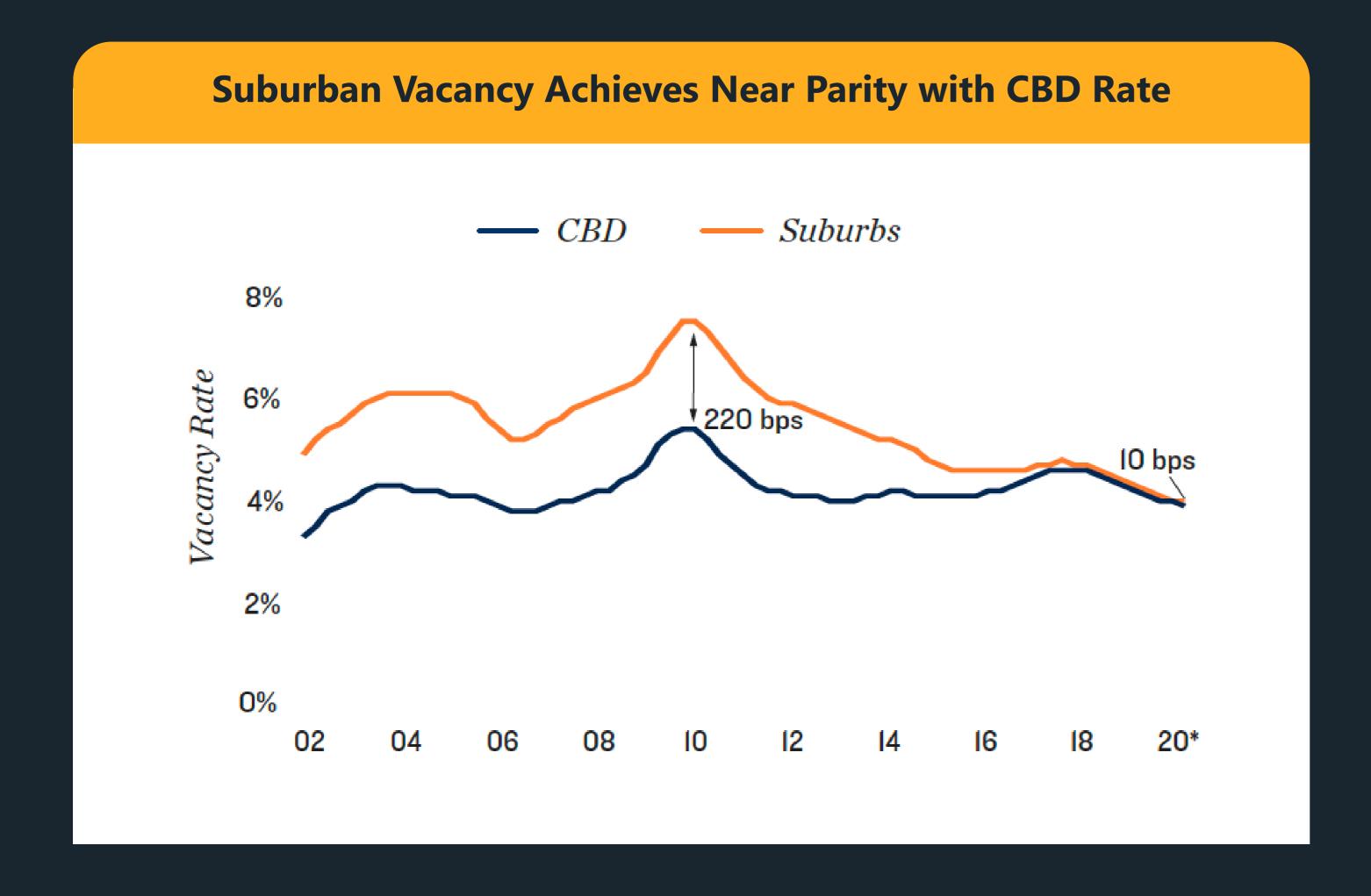


This is one of the greatest moves to the suburbs from urban areas since the 1950s or the '60s. I recently moved out of Los Angeles into a suburban area, and I can tell you on a very personal level, my area is on fire!

— Robert Herjavec, Investor

# Redfin: Massive Migration to the Suburbs

### Suburbanization: COVID Accelerates Shift to Suburbia



- ✔ Urban Life Without Urban Crowds: Working from home is now the new norm, which bodes the question "what is the future of CBDs?"
- Urban living: high-rise apartment buildings and public transit, both factors that raise contagion risk
- Suburbia: Backyard and quiet neighborhood more appealing when practicing social distancing. Car ownership also more feasible.
- Units in urban suburban nodes or pockets on city boundaries will attract more remote workers



# Telecommuting: Could Turn 2 Million Renters Into Buyers

### **Telecommuting Allows More Renters to Buy in Affordable Metros**

Ran k	City	Share
#1	San Jose, CA	25.2%
#2	San Francisco, CA	22.0%
#3	Los Angeles, CA	17.2%
#4	San Diego, CA	15.4%
#5	Denver, CO	14.6%
#6	Salt Lake City, UT	14.1%
#7	Seattle, WA	12.5%
#8	Portland, OR	11.7%
#9	Sacramento, CA	10.5%
#10	Boston, MA	10.3%
#11	Austin, TX	9.5%
#12	Washington, DC	8.6%
#13	New York, NY	7.4%
#14	Phoenix, AZ	7.1%
#15	Minneapolis-St Paul, MN	6.6%

Rank	City	Share
#16	Riverside, CA	6.4%
#17	Raleigh, NC	5.9%
#18	Providence, RI	5.5%
#19	Nashville, TN	5.4%
#20	Las Vegas, NV	5.3%
#21	Orlando, FL	3.5%
#22	Dallas-Fort Worth, TX	3.2%
#23	Miami, FL	3.1%
#24	Virginia Beach, VA	2.9%
#25	Baltimore, MD	2.5%
#26	Atlanta, GA	2.2%
#27	Tampa, FL	2.2%
#28	Charlotte, NC	1.6%
#29	Houston, TX	1.6%
#30	Jacksonville, FL	1.2%





4.5%
U.S. RENTER
HOUSEHOLDS







# **Expensive Cities:** Remote Workers Ready to Move

Hired Surveyed 2,300 Tech Workers Based In New York, The UK, And the Bay Area



40%

NEW YORK REMOTE

WORKERS

WOULD MOVE

33%

UNITED KINGDOM
REMOTE WORKERS
WOULD MOVE

18%
SAN FRAN
HOUSEHOLDS CAN
AFFORD A HOME

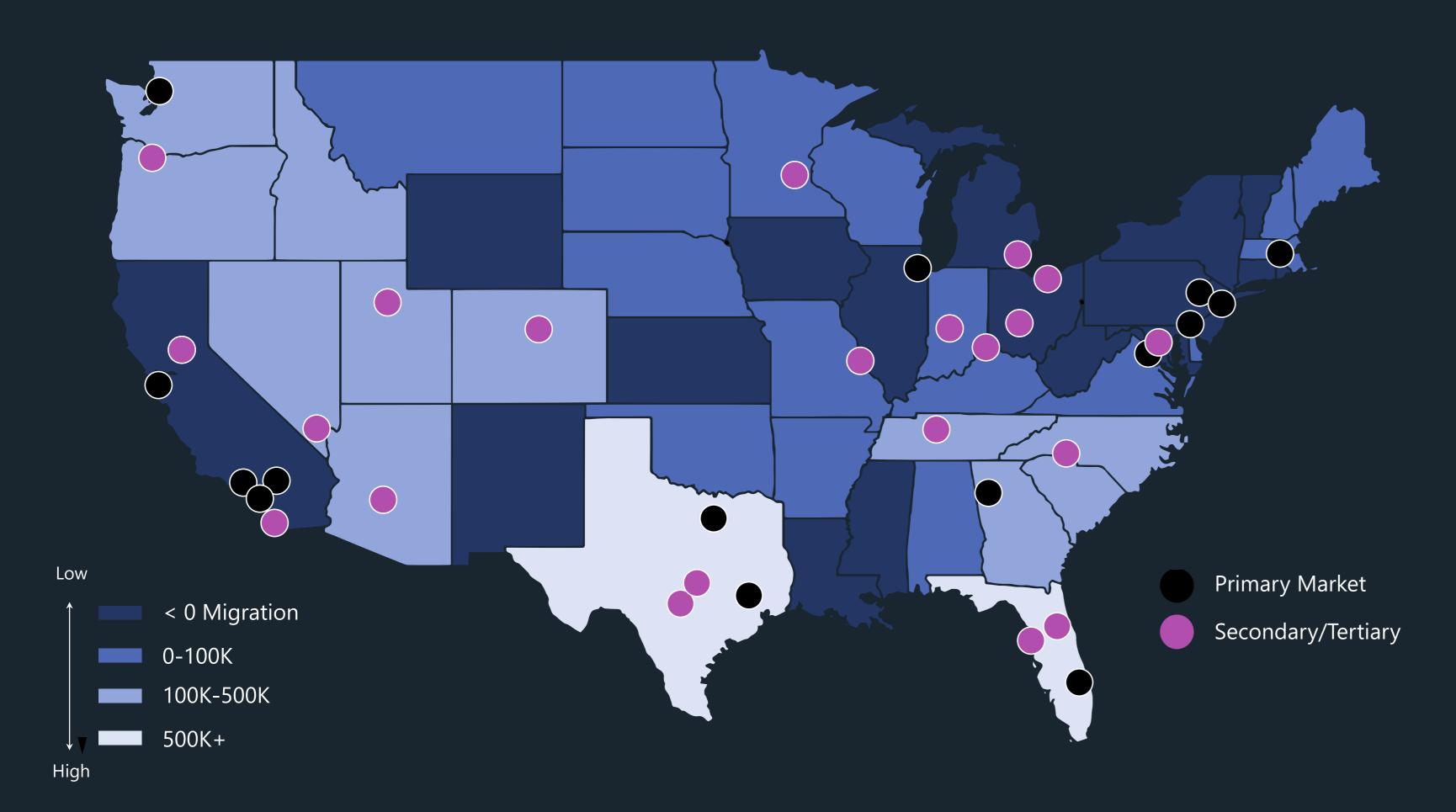


# NYC: Empty Apartments Reach Record High



TCH NOW

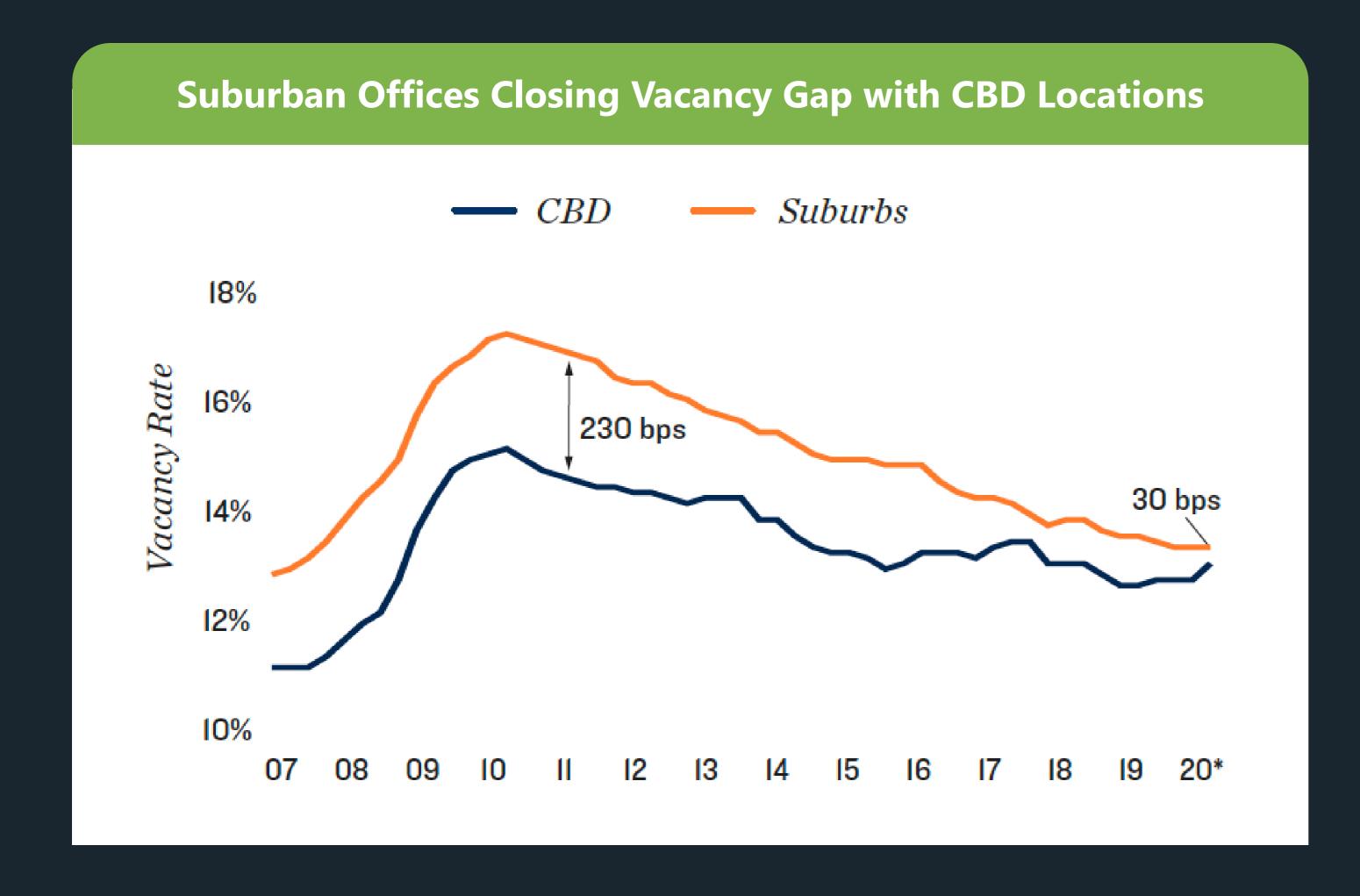
# Smaller Metros: Poised to Outperform



- Assets in smaller metros recorded tighter vacancy and stronger rent growth than comparable properties in gateway metros
- Companies looking for office space in smaller cities = reduce overhead and tax exposure
- As more residential and office space fills, other asset classes will benefit, including retail malls, industrial facilities and self-storage



# Commercial Offices: Following People to Suburbs

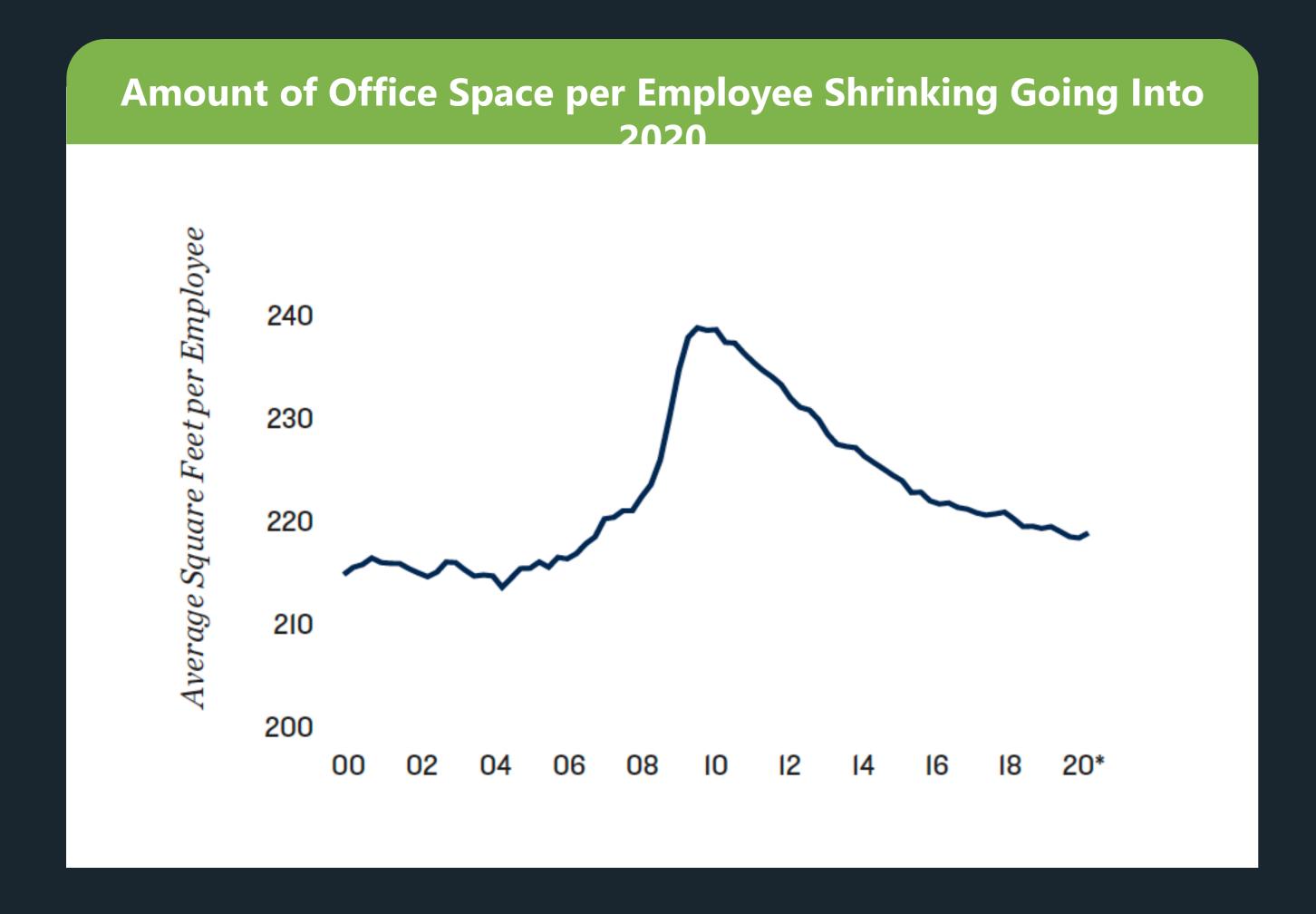


### PANDEMIC ALTERS HOUSING CHOICES:

- Millennials increasingly looking for suburban single and multifamily homes, raising demand for nearby offices and retail space
- Gap between suburban and urban apartment and office vacancies has fallen to less than 40 basis points.
- Companies are opening offices in new cities and in suburban areas to recruit and retain key personnel
- Amazon announced they will open six new physical offices in six different tech hub cities, creating 3.5K new jobs



# Commercial: Implications for Offices, Retail & Industrial

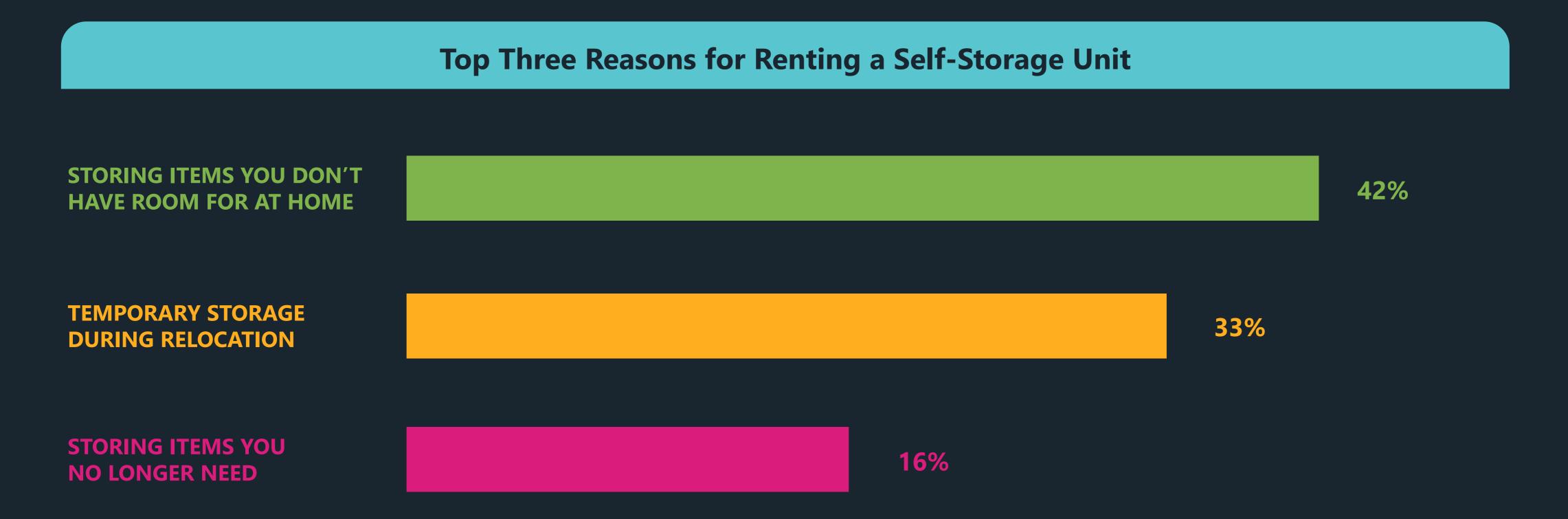


- CBD businesses will reconsider high-cost floor plans in prominent buildings if only a minority work on-site
- Solution: Businesses moving to suburbs where costs are lower. May hold onto CBD location but open satellite spaces.
- In addition, each home sale also creates a \$5,200 in retail sales as people remodel, furnish their home, and purchase new necessities
- This activity then ripples into industrial space demand, and so on. Suburban office and neighborhood retail centers will also benefit from population shift



# Self-Storage: Relocations a Key Driver for Demand

Relocations have also been a boon for self storage since 1/3 of non-business self-storage renters come from people changing residences





### Suburbanization: The Inevitable Shift

### **Urban**

- Proximity to office (non-remote)
- Acute population density
- Unaffordable to many, higher cost floorplans and living costs
- Walkability to museums, restaurants and bars matter less when closed
- High-rise apartments, elevators and public transit all pose a health risk



### Suburban

- Backyard and quiet neighborhoods more conducive to social distancing
- More spacious units
- Larger lot sizes for amenities
- Extra bedroom double as home office
- Minimal car traffic, higher car ownership
- Reduced noise pollution
- More relaxing environment





### HOW DO THE VARIOUS ASSET CLASSES COMPARE?

Outperforming Opportunities Exist Within All Property Types



240 Unit ~ New Construction Class A Multifamily

### The FALLS AT CRISMON COMMONS ~ Mesa AZ



**1031 Exchange Eligible** 



QRP, Solo 401k, SD-IRA







### PHOENIX METRO

#1 Fastest Growing U.S. City

Third Year in a Row by Numeric Increase, US News and World Report, 2019

#2 Highest Employment Growth

CBRE Research, 2018

#3 Fastest Growing Economy

CBRE Research, 2019

#15 Best City for Teleworking

Sperling's Best Places, 2019

#2

Best City for Young Professionals

Forbes, 2017

#6

Largest Data Center Market

US News and World Report, 2019

#26

Best Places to Live

US News and World Report, 2019

### MARICOPA COUNTY

#1 Fastest Growing County in U.S.

Third Year in a Row – US News and World Report, 2019

#1 Best Charter School in U.S.

Basis Scottsdale High School, US News and World Report, 2019

#1 America's Best Employer

Maricopa County Community College District, Forbes, 2017

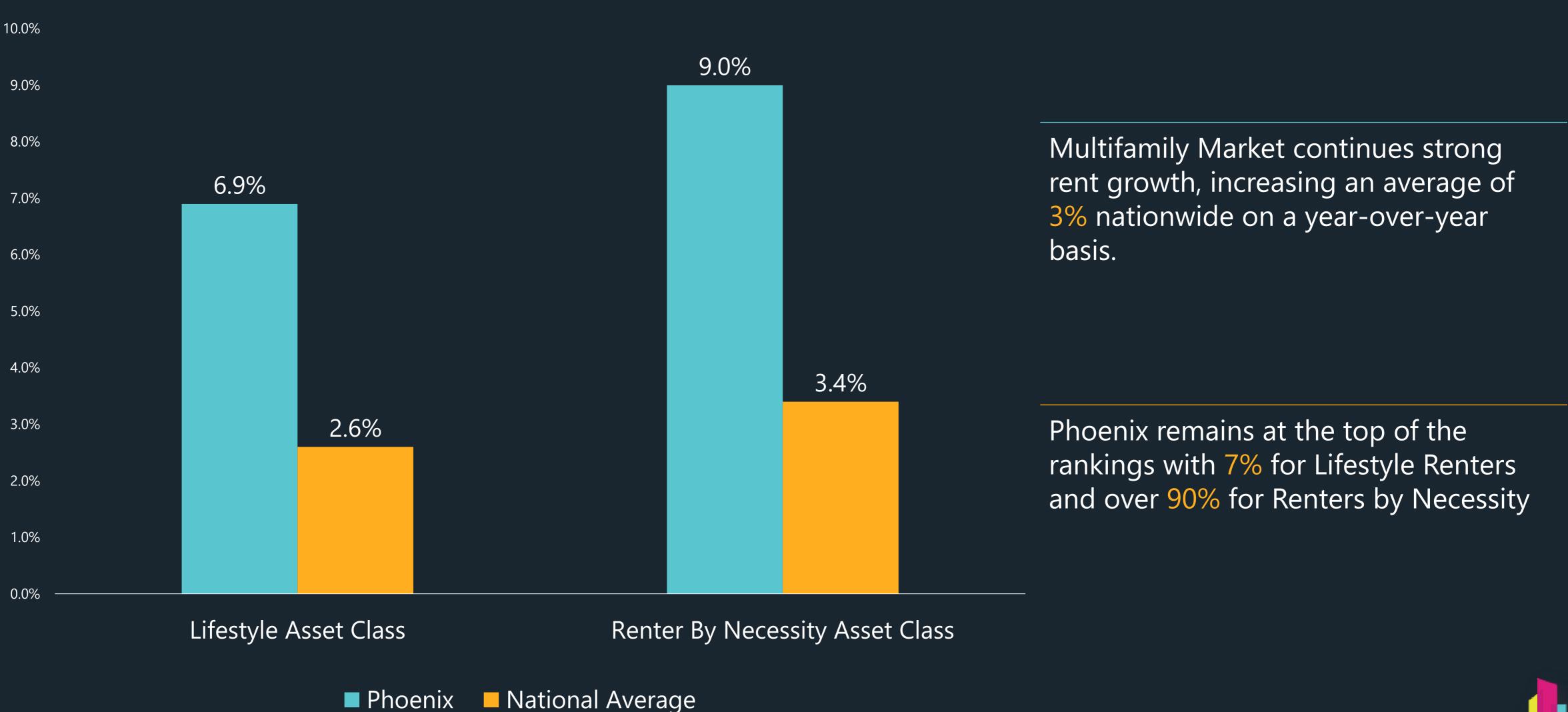
#3 Most Innovative School in U.S.

Arizona State University in Tempe, US News and World Report, 2016



### Phoenix Metro: Year Over Year Rent Growth













# Grocapitus Review: Avinash P, Repeat Investor

"I have invested in a couple of opportunities with Grocapitus. One of them is a multifamily property, which has been performing superbly, and way better than the initial predictions.

The second one is a new construction project, which is on-time, even during the COVID-19 pandemic. And the marketing material that the team has put together to lease these new units is top-notch. Awesome job by Neal and his team in managing the properties and consistent communication with their investors.

- AVINASH P





"As an investor in Park Canyon I am so impressed with the management team. One of the things that I really like are the quarterly updates of the project. They keep you informed of what is going on with the project and point out both the good and the bad. You are never kept in the dark about your investment. This is a fantastic project and I am so happy that I am an investor!"

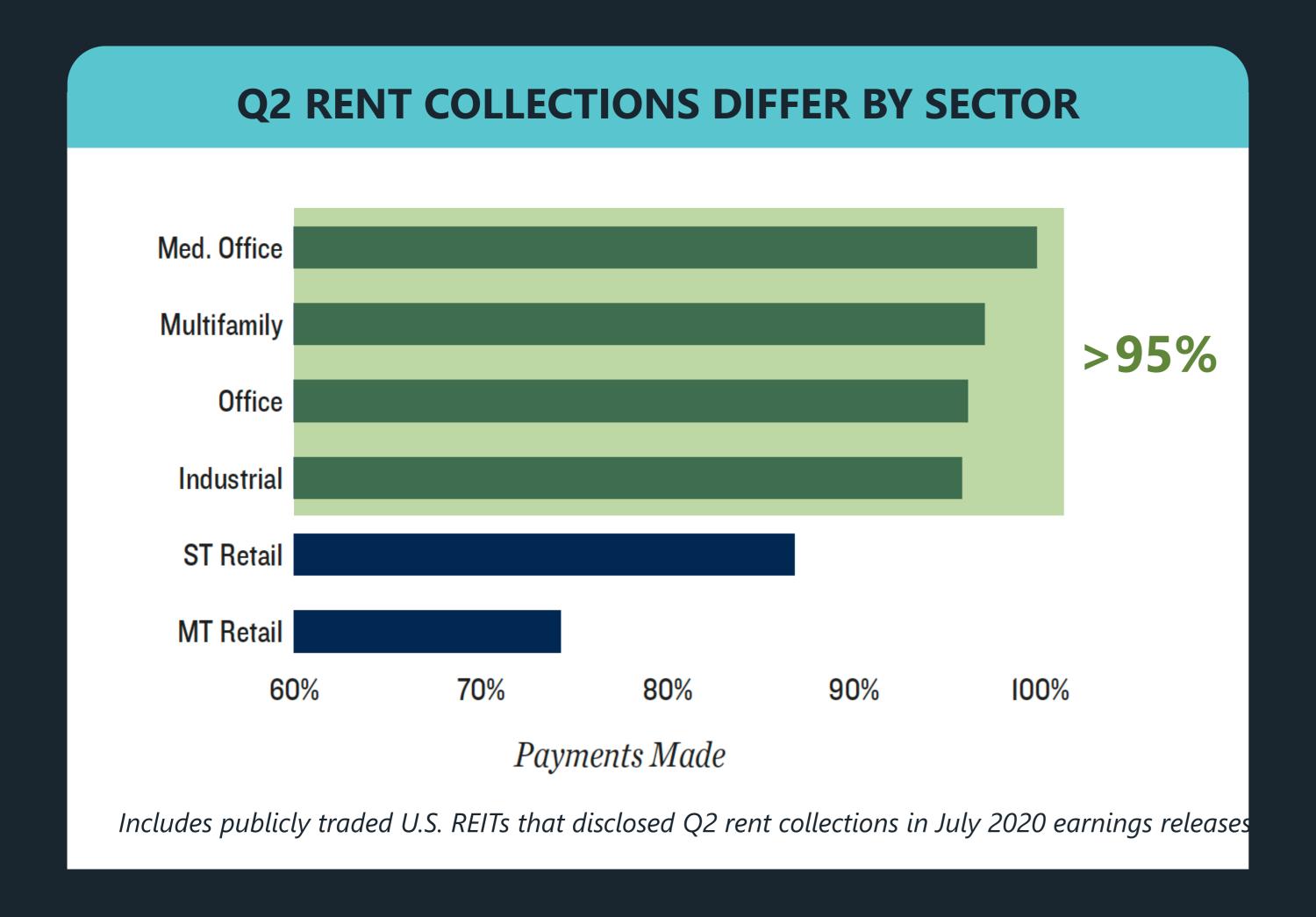
- KATRINA J



### HOW DO THE VARIOUS ASSET CLASSES COMPARE?

Outperforming Opportunities Exist Within All Property Types

# **Q2 Rent Collections:** Solid For Most Property Types



- Collections from healthcare, multifamily, office and industrial tenants all exceeded 95%
- Medical office and Industrial: could continue to outperform other sectors in Q3
- Multifamily and Office: expiration of stimulus will weigh more heavily on these sectors
- Retail: necessity-based single tenant retail more resilient than multi-tenant retail (malls).



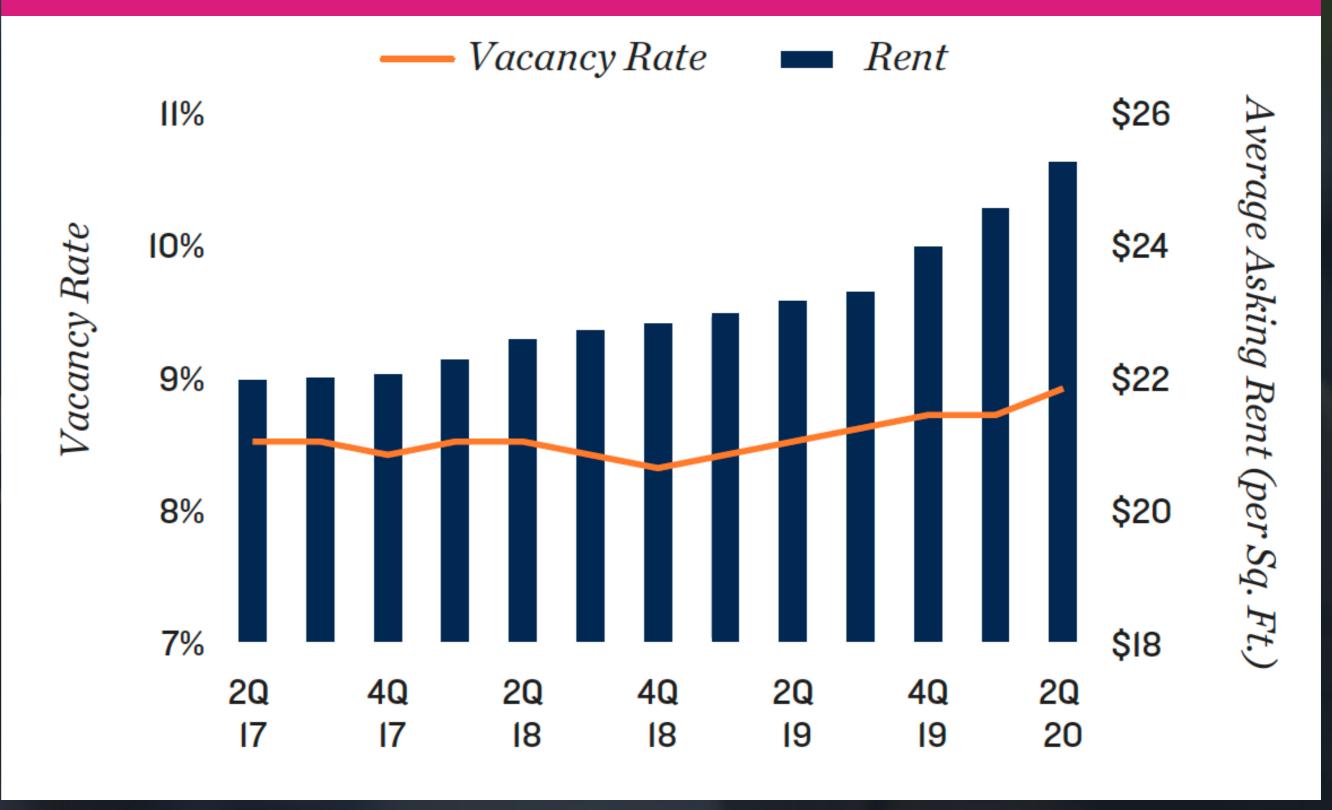
# Medical Office: Faring Better Than Most

### HIGHEST RENT COLLECTION RATE OF THEM ALL



- Entire segment resilient with Q2 rent collections reported at 99.8% percent
- ✓ Going forward, healthcare and medical office buildings will continue to outperform as people feel safer returning to treatment centers for care with new protocols in place

### **Medical Office Rent Surges Amid Pandemic**



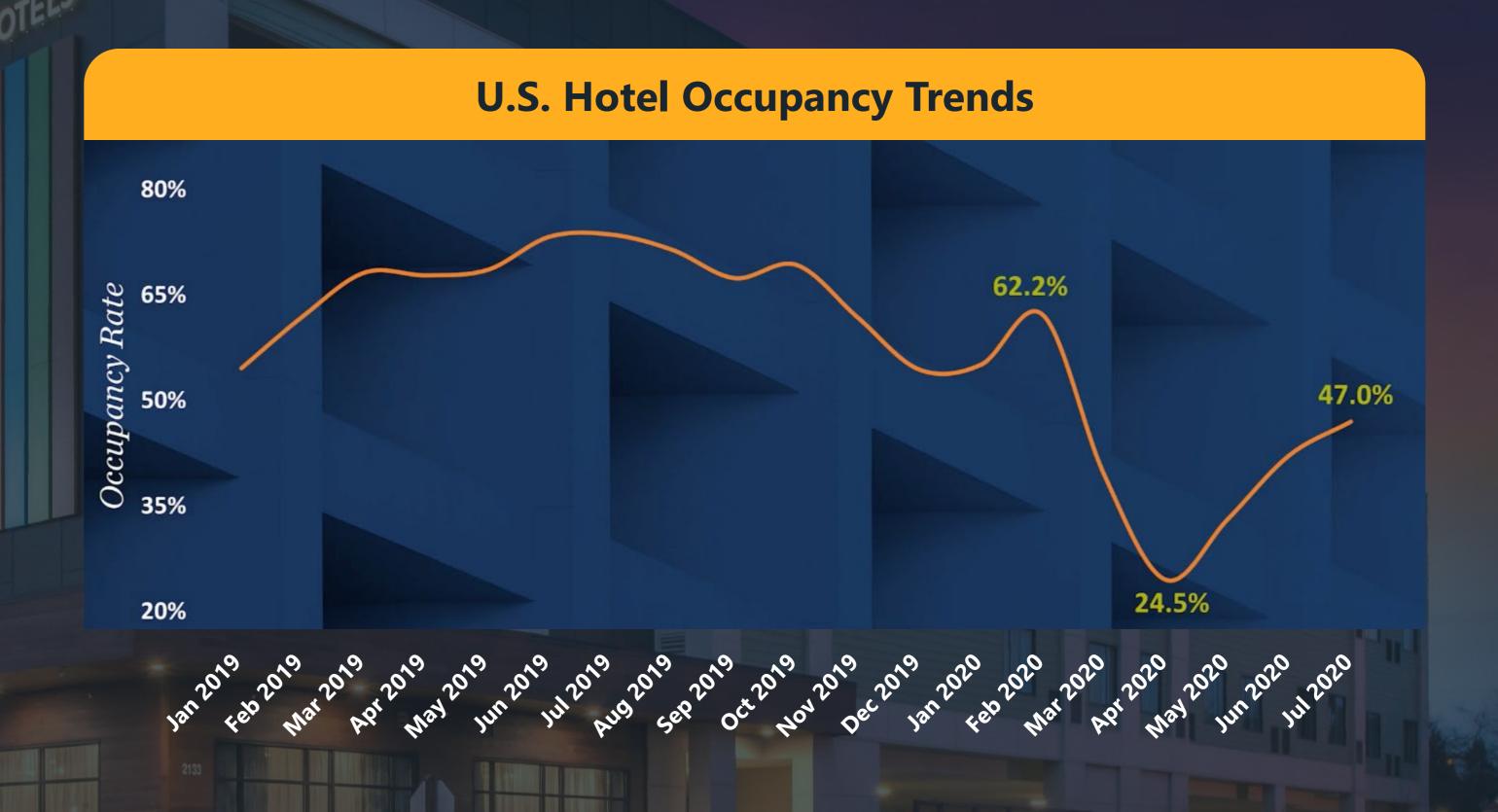


# Hotels: Hardest Hit by Pandemic

# DRIVABLE VACATION HOTELS LESS IMPACTED



- Massive downturn in hotel occupancies and revenues, with some segments holding up better
- Hotels at drivable vacation destinations (e.g. units with kitchens) have seen modest occupancy erosion, as people avoid flying and keep their vacations in driving range



Source: Marcus & Millichap Research Services, STR, August 2020.

Our friends at Marcus & Millichap have phenomenal market data. We highly recommend them as nationwide broker partners for you.

# Retail: Essential Retail Outperforms Peers

### **ESSENTIAL RETAIL WINS**



- Multi-tenant retail severely impacted by pandemic-led lockdown, but necessity-based single tenant retailers remain resilient
- Grocery-anchored neighborhood centers largely sustained operations with comparatively high rent collection and occupancy levels
- Quick-service restaurants, auto parts and drugstores poised for quick recovery (compared to experience-based retailers such as gyms, theaters)









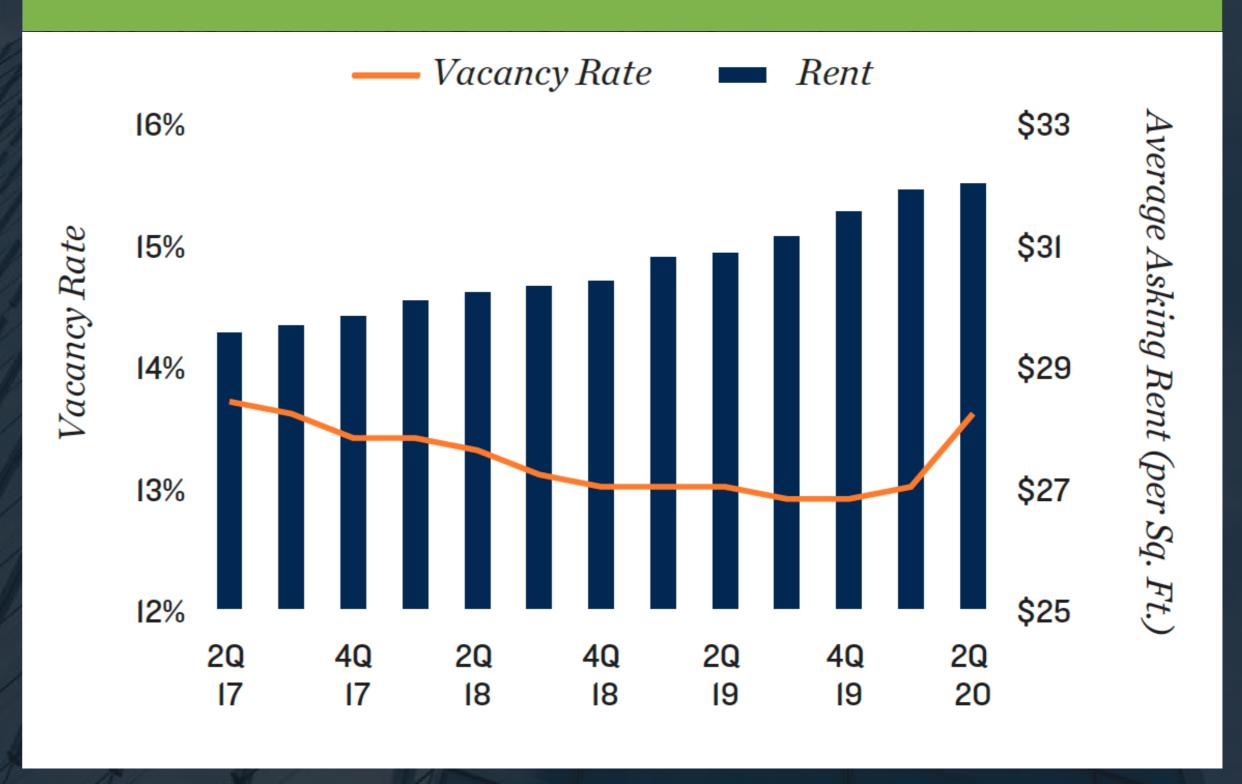
# Office: Performing Well Amidst Shutdowns

# INITIAL DISRUPTIONS HAD MINIMAL IMPACT



- Q2 rent collections came in at 96.1% despite widespread disruptions
- Office sector will face more pressure in short and long term (e.g. downsizing firms to offset revenue lost during shutdown, firms shifting operations to remote working, etc.)

### **Higher Office Vacancy Yet to Reflect on Rent**





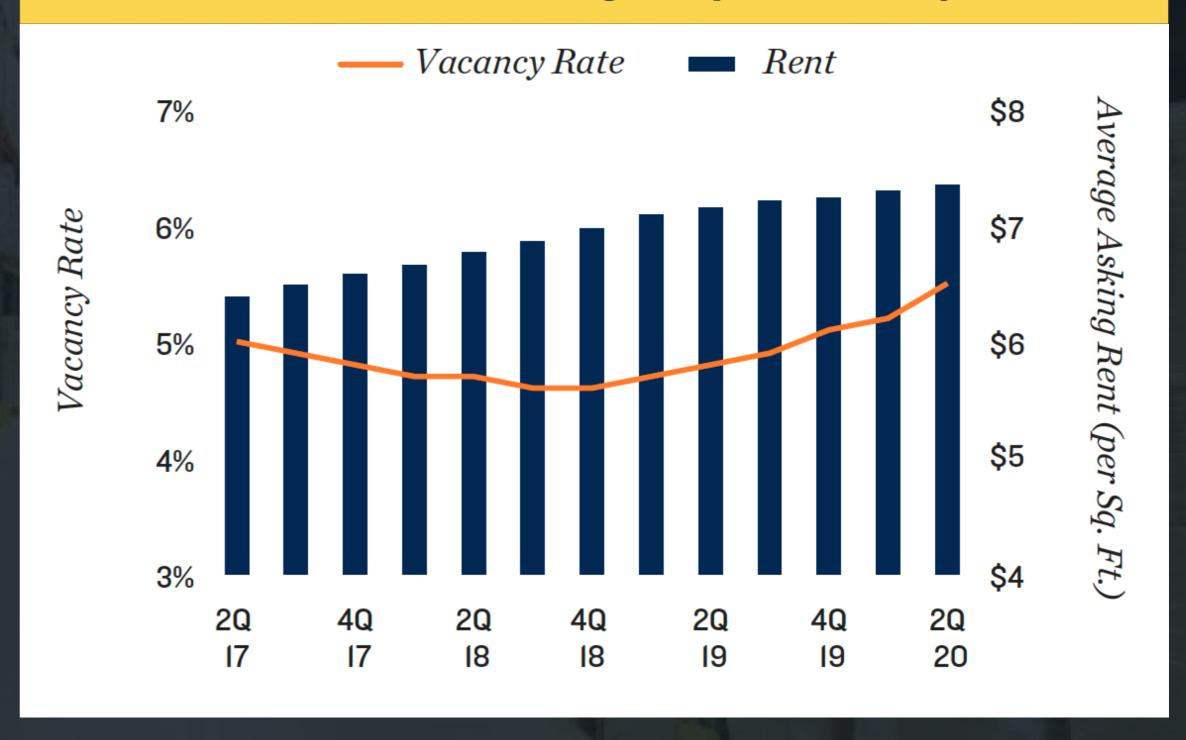
# Industrial: Positive Trends Strengthen Outlook

### **RAPID GROWTH CONTINUES**



- Q2 rent collections at 95.8% and expected to be strong going forward
- Industrial segment underpinned by rapid growth of e-commerce and efforts to reshore manufacturing
- Many businesses grew during pandemic and want to expand operations

### **Industrial Rent Growing Despite Vacancy Lift**





# Industrial: Online Shopping Boosts Demand

### **BENEFITING FROM A BROAD BASED LIFT**



- Given shelter-in-place, e-Commerce adoption rate has spiked and expected to remain very sticky long-term, accelerating need for industrial and warehouse space
- e-Commerce grew at a steady rate of 15% annually and its share of overall retail sales has grown at a rate of at 11% (CBRE, April 2020)
- CBRE indicates each incremental \$1B of e-Commerce sales growth requires ~1.25M SF of space







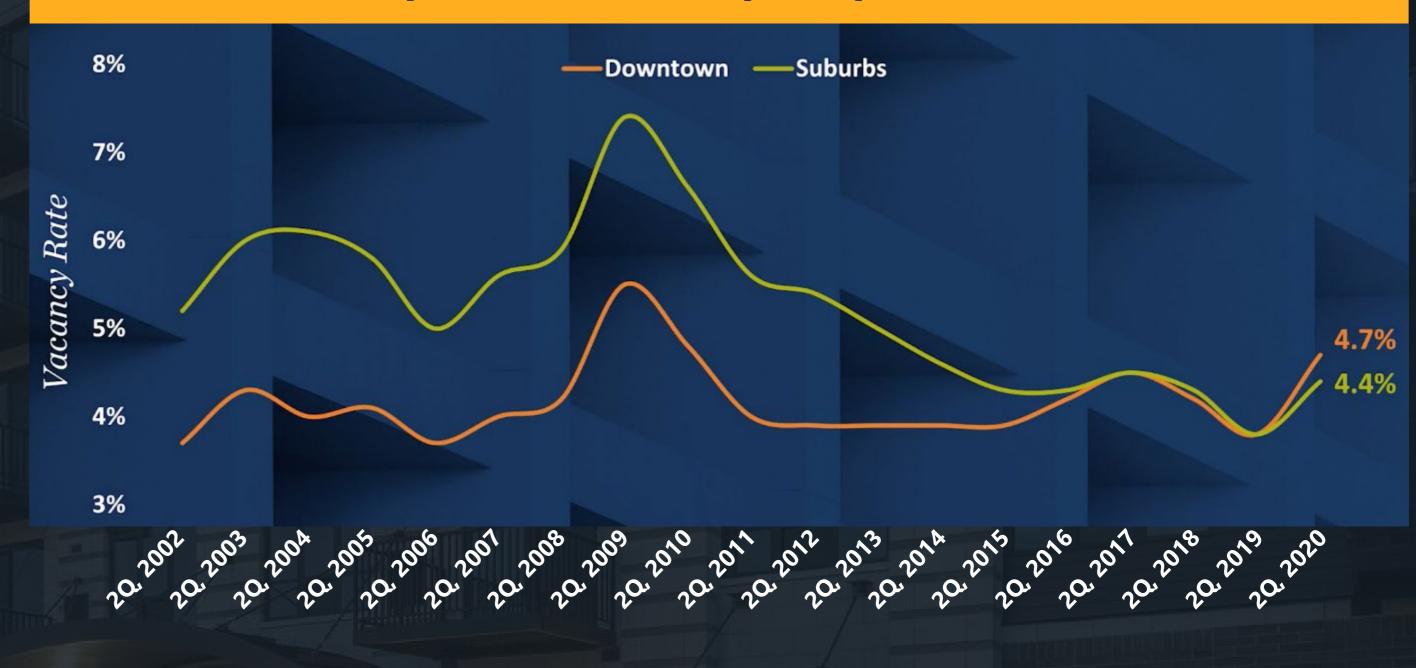
# Multifamily: Suburban Apartments Well Positioned

### THE GREAT SUBURBAN SHIFT



- Suburban apartments seeing stronger demand as people seek larger, less dense living arrangements at a more affordable rent
- Suburban apartment vacancies have fallen below their urban counterparts for the first time on record

### **Suburban Apartment Vacancy Outperforms Downtown**







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### What is a Real Estate IRA?

### The number-one investment strategy used by Entrust clients

### Definition

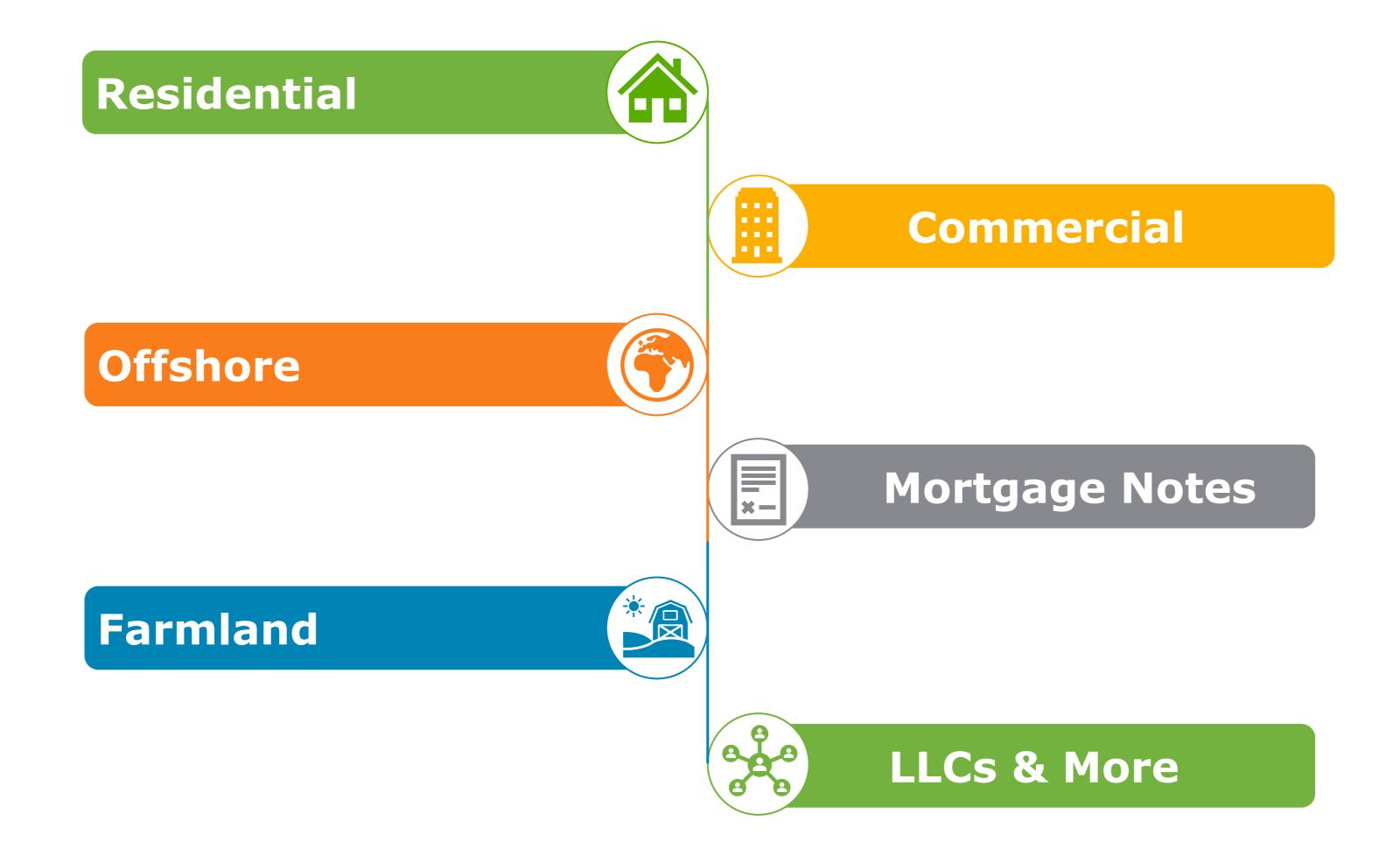
- An IRA that invests in real estate
- Standard IRS rules applicable to all IRAs
- Any kind of real estate is eligible

### **IRA Options**

- Personal: Traditional IRA, Roth IRA, ESA, HSA
- Business: SEP IRA, SIMPLE IRA, Individual 401(k)



### Real Estate Investment Options





# myDirection Card: Streamline Property Management







**Streamline Your Transactions** 



Save Money





## myDirection Card: What You Can Do With It

- ✓ Make quick payments toward your real estate investment expenses
- Pay labor and contractors working on your investment properties
- Pay for repairs and renovations





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- ✓ Pay utility bills





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### What's Next?



Want more information on the myDirection Card?

Reach out to your account representative or Bill Neville



**Need more information from Neal?** 

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# Time for Questions



