

WHICH TEMPLATE SHOULD I USE?

Investit Template are templates provided for analyzing specific kind of analysis including;

- Investment Analysis
- Buy versus Lease Analysis.
- Lease Analysis. Landlord
- Lease Analysis. Tenant
- Development Analysis
- Hotels

In addition templates are further broken down by property types such as;

- Office Buildings
- Shopping Centers
- Industrial
- Mixed use Buildings etc
- Hotels

There are two types of Investment Templates;

1. Templates without a Rent Roll & Categories
2. Templates with Rent Roll and Categories

Which type of template should you use?

Templates with out Rent Roll and Categories

If you are analyzing a straight forward investment such as a 40 unit rental apartment building is very unlikely that you would want to enter every tenant in a rent roll and then project the rents for each of the 40 tenant. This would take a lot of time and not improve the financial analysis.

When should you use investment templates with Rent Rolls and Categories?

Templates with Rent Roll and Categories

Rent Roll allows you to set up the revenue being generated tenant by tenant but this is a slow process because of the amount of entries and projection required. This is of value for investments like shopping centers and office buildings where each lease arrangement is different and can consist of Basic Rent, Free Rent, Additional Rent, Rent Caps and Recoverable Expense Caps and Stops and % rents for shopping centers.

Categories allows you to set up Profit centers. As an example, in the analysis of a mixed use retail/office building you may have two Categories "Retail" and "Office" or in a shopping center you may want to generate the income and expense statements for the "Retail" and "Food Court" categories.

Another use of Categories is an investment that has two or more buildings on the property and you which to generate the Income Statement for each property plus the combined Statement.

Some guidelines for choosing a template

Using Rent Roll and Categories increases the complexity and time to enter and project the revenue and expenses.

Use templates **without** Rent Roll and Categories for;

1. Straight forward investments such as rental apartment buildings, mini warehouses, trailer parks where the lease arrangements are simple
2. Quick analysis of complex investments such as office building with many tenants
3. Office, Industrial, retail properties with a **single tenant**

Use templates **with** Rent Roll and Categories for;

1. Investment with complex lease arrangements and multiple tenants such as office, retail and industrial buildings
2. When you need accurate monthly cash flow which reflects monthly changes in income and expenses. As an example, you are analyzing a rental apartment building with 10 tenants and you want to generate the monthly rent changes for each tenant and expense in order to develop an accurate monthly cash flow
3. You need to use Categories to create profit centers. As an example, a shopping center could be broken down into Retail, Food Court and Parking Categories
4. The property consists of several buildings and you need the Income and Expense Statement for each building plus the combined Statement

Warning: An investment Analysis created in a template without Rent Roll and Category cannot be transferred to a template with Rent Roll and Categories.

If you are unsure always select a template with Rent Roll and Categories and;

1. Don't use the Rent Roll.
2. Don't use Categories. As an example, if you open up a Rental Unit Template with Categories the default Category is Rental Units. If only one Category is used there will only be one Income and Expense Statement. One Category is the same as having "No Categories"