

SAMPLE INVESTMENT DECISION WORKSHEET

Call or email Your Surrealtors for your *customizable* Investment Decision Worksheet



Enter data in green highlighted cells.
White cells will calculate automatically.

Roll over any small red triangle
at the upper right hand corner of a cell to see
special instructions about how to enter data in

Property Characteristics		Address 1
	Number of Units	
	Gross Living Area (Sq. Ft.)	
	Lot Size	
Room Counts		
Location notes		
Condition		
Systems		
Lead Paint		
Leases		
Parking		
Utilities		

Property Characteristics		Address 2
	Number of Units	
	Gross Living Area (Sq. Ft.)	
	Lot Size	
Room Counts		
Location notes		
Condition		
Systems		
Lead Paint		
Leases		
Parking		
Utilities		

Financing		
	Purchase Price	
	Down Payment %	
	Calculated Down Payment	\$ -
	Other Down Payment Amount (instead of Down Payment %)	
	Total Down Payment	
	Points, Closing Costs only if Financed	
Total Amount Financed		\$ -

Financing		
	Purchase Price	\$ -
	Down Payment %	
	Calculated Down Payment	\$ -
	Other Down Payment Amount (instead of Down Payment %)	\$ -
	Total Down Payment	
	Points, Closing Costs, only if financed	
Total Amount Financed		\$ -

Debt Service		
	Amount Financed	\$ -
	Interest Rate	
	Mortgage Term (years)	
Monthly Principal & Interest		\$ -
Annual Debt Service		\$ -
Monthly Principal, Interest, Property Taxes (PIT)*		\$ -
Monthly Principal, Interest, Property Taxes, Insurance (PITI)*		\$ -

Debt Service		
	Amount Financed	\$ -
	Interest Rate	
	Mortgage Term (years)	
Monthly Principal & Interest		\$ -
Annual Debt Service		\$ -
Monthly Principal, Interest, Property Taxes (PIT)*		\$ -
Monthly Principal, Interest, Property Taxes, Insurance (PITI)*		\$ -

* Enter property taxes and insurance on lines 76 and 77 below

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Income		
Annual Scheduled Rental Income		
or Calculate Monthly: Unit 1		
Unit 2	\$ -	
Unit 3	\$ -	
Unit 4	\$ -	
Unit 5		
Unit 6		
Retail Store		
Retail Store		
Annual Scheduled Rental Income		
Vacancy/Rent Loss %		
Annual Vacancy/Rent Loss Calculated	\$ -	
Annual Net Rental Income	\$ -	
Monthly Net Rental Income	\$ -	

Income		
Annual Scheduled Rental Income		
or Calculate Monthly: Unit 1		
Unit 2		
Unit 3		
Unit 4		
Unit 5		
Unit 6		
Retail Store		
Retail Store		
Other Income, e.g. parking rental		
Annual Scheduled Rental Income		
Vacancy/Rent Loss %		
Annual Vacancy/Rent Loss Calculated	\$ -	
Annual Net Rental Income	\$ -	
Monthly Net Rental Income	\$ -	

Annual Operating Expenses		
(Be sure to use annual, not monthly, amounts.)		
Property Taxes		
Insurance		
Condo Fee		
Water & Sewer		
Legal		
Electric		
Gas or Oil		
Maintenance		
Pest Control		
Landscaping, Snow Removal		
Trash		
Supplies		
Repairs		
Rental Fees		
Management Fee %		
Management Fee Calculated	\$ -	
Total Annual Operating Expenses	\$ -	
Total Monthly Operating Expenses	\$ -	
Total Monthly Expenses Including Debt Service	\$ -	

Annual Operating Expenses		
(Be sure to use annual, not monthly, amounts.)		
Property Taxes		
Insurance		
Condo Fee		
Water & Sewer		
Legal		
Electric		
Gas or Oil		
Maintenance		
Pest Control		
Landscaping, Snow Removal		
Trash		
Supplies		
Repairs		
Rental Fees		
Management Fee %		
Management Fee Calculated	\$ -	
Total Annual Operating Expenses	\$ -	
Total Monthly Operating Expenses	\$ -	
Total Monthly Expenses Including Debt Service	\$ -	

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NOI		
Annual Net Rental Income	-	\$ -
Annual Operating Expenses		\$ -
Annual Net Operating Income		\$ -

NOI		
Annual Net Rental Income	-	\$ -
Annual Operating Expenses		\$ -
Annual Net Operating Income		\$ -

Cash Flow		
Monthly Net Rental Income	-	\$ -
Total Monthly Expenses Including Debt Service		\$ -
Monthly Cash In or (Out)		\$ -
Annual Cash In or (Out)		\$ -

Cash Flow		
Monthly Net Rental Income	-	\$ -
Total Monthly Expenses Including Debt Service		\$ -
Monthly Cash In or (Out)		\$ -
Annual Cash In or (Out)		\$ -

Cash on Cash Return		
(Do not include any costs that are financed.)		
Down Payment	+	\$ -
Other Costs of Acquisition, e.g points, closing costs, not financed	+	
Renovation Costs	+	
Total Cash Invested		\$ -
Annual Rate of Return on Cash Invested		0.00%

Cash on Cash Return		
(Do not include any costs that are financed.)		
Down Payment	+	\$ -
Other Costs of Acquisition, e.g points, closing costs, not financed	+	
Renovation Costs	+	
Total Cash Invested		\$ -
Annual Rate of Return on Cash Invested		0.00%

Investment CAP Rate		
NOI /		\$ -
Purchase Price		\$ -
CAP Rate		0.00%

Investment CAP Rate		
NOI /		\$ -
Purchase Price		\$ -
CAP Rate		0.00%

Net Income Multiplier		
Purchase Price /		\$ -
NOI		\$ -
Net Income Multiplier		0.00

Net Income Multiplier		
Purchase Price /		\$ -
NOI		\$ -
Net Income Multiplier		0.00

Gross Rent Multiplier		
Purchase Price /		\$ -
Gross Rent		\$ -
Gross Rent Multiplier		0.00

Gross Rent Multiplier		
Purchase Price /		\$ -
Gross Rent		\$ -
Gross Rent Multiplier		0.00

Debt Service Coverage Ratio		
NOI /		\$ -
Annual Debt Service		\$ -
Coverage Ratio		0.00

Debt Service Coverage Ratio		
NOI /		\$ -
Annual Debt Service		\$ -
Coverage Ratio		0.00