

# GUIDE TO INVESTING

ROLES AND RESPONSIBILITIES FOR INVESTORS  
PRESENTED BY CITYPOINT





# OUR ROLE WORKING WITH INVESTORS

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[WWW.CITYPOINT.COM/SELLERS](http://WWW.CITYPOINT.COM/SELLERS)

**Help investors find suitable investment properties**

**Connect you with investor-friendly service providers**

**Assist in the rental of your investment**

As properties on our platform are not always a turn-key investment, investors have roles and responsibilities listed on the following pages.

Citypoint needs to concentrate its efforts on sourcing deals and evaluating investments. It is critical that investors recognize our efforts are best served in this capacity.

Investors will need to be good communicators and cooperate with a number of service providers that are employed by them throughout each investment.

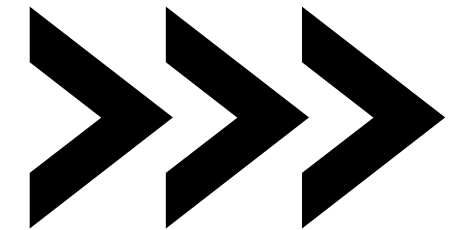


**Citypoint** has developed a system to help investors be successful using our recommended service providers. You are not required to use these services and are able to select your own preferred providers.

We have developed relationships with lenders, attorneys, title companies, property managers and leasing agencies. These relationships are for you to use, but ultimately you are the decision maker for each transaction.

**Citypoint** functions best when investors share a common understanding of each others' roles and responsibilities. This guide is designed to aid investors understanding of the entire process to maximize chances of success.

Our goal is to make investing in real estate predictable, repeatable and profitable. To achieve this goal we need your help!



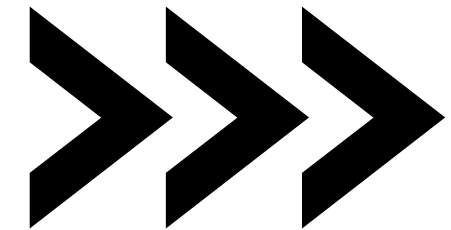
## DIVISION OF RESPONSIBILITY

Understanding your role in the transaction is critical. Success cannot be certain, but having a clear definition of roles and responsibilities will reduce stress and add predictability to each transaction.

## CITYPOINT'S ROLE - PURCHASING PROCESS

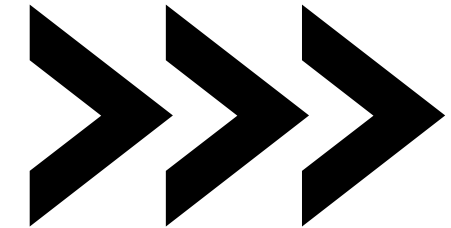
- Sending available properties to investors
- Providing photographs and/or video of subject property
- Coordinate showing or virtual tour of property
- Prepare contract and facilitate execution by investor & seller
- Coordinate with investor's attorney and title company
- Communicate regularly with investor

The information on Citypoint is provided to Citypoint from the seller of the property. Buyer agrees that Citypoint is not liable for the information provided by seller. While Citypoint is not responsible for confirming the accuracy of the information from seller, Citypoint can request confirmation on seller's provided information. In the event Citypoint obtains confirmation from seller, Buyer understands and agrees that Citypoint still remain not liable to Buyer for such confirmed information.



## INVESTOR'S ROLE - PURCHASING PROCESS

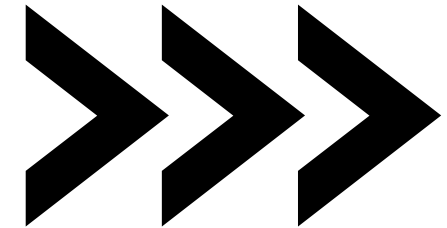
- Review presented investment property
- Review scope and budget if applicable
- Review financials
- Review photos and/or videos of the property
- Viewing of property
- The review and signing of contracts, disclosures, addenda, etc.
- Deposit earnest money in a timely manner
- Conducting independent professional inspections, tests, evaluations, etc
- Requesting and reviewing any docs/info for investor's independent due diligence and/or for investor's lender's purposes
- Coordinate closing date with attorney and title company
- Solicit quotes and bind required insurance
- Attend closing or pre-sign with attorney
- Deliver funds to closing via wire instructions from title company



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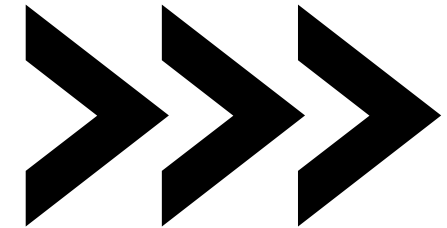
## CITYPOINT'S ROLE - LEASING

- Provide listing agreement and disclosures
- Enter listing in MLS with investor approved listing description
- Order marketing photos for the property
- Enter property into our showing service and feedback
- Field phone calls and leads from property to experienced brokers in our firm using CRM system
- Answer broker calls/emails regarding property details
- Review marketing strategy as home is listed on market
- Suggest enhancements to investor to accelerate sale
- Review offer submitted by showing broker
- Review tenant's approval letter and qualifications
- Negotiate with tenant broker on price, terms, and conditions
- Obtain signatures electronically from the tenant and owner for contract, disclosures and other addenda
- Obtain 1st Month's Rent and Security Deposit
- Coordinate Move-in with tenant



## INVESTOR'S ROLE - LEASING

- Provide **Citypoint** with any major improvements made to the property that may not be easily identified in photos alone, such as new roof, new HVAC, updated electric, etc.
- Complete electronic listing agreement and disclosures
- Review property on to ensure the accuracy of the listing
- Responding to email feedback provided by showing brokers and communicating issues with your maintenance team
- Completing electronic documents for cancellation, relist and price reduction requests
- Discuss offer presented by **Citypoint**
- Negotiate price, terms, and conditions
- Electronically sign lease, disclosures, and addenda as required
- Your attorney will start a new file and send an introduction letter





## DISCLAIMER

Investing in real estate can be risky. You can make money and you can lose money as well. Forward-looking statements or estimations provided by Citypoint do not represent any final determination on investment performance. While the information provided to investors has been researched and is thought to be reasonable and accurate, any real estate investment is speculative in nature. Any areas concerning taxes or specific legal or technical questions should be referred to lawyers, accountants, consultants, brokers, or other professionals licensed, qualified or authorized to render such advice. Real estate investing may not be suitable for all investors. Citypoint does not hire or have a financial interest in any 3rd party service providers. Investors can hire any provider of their choosing. Citypoint only acts as a real estate platform.

Buyer Acknowledgement:

Buyer acknowledges that real estate investment has inherent risks, including potential financial losses. Buyer further acknowledges that material facts of a property can change prior to or during the buyer's transaction. Buyer further acknowledges that the financials of a property can change during the course of buyer's transaction. Buyer agrees that it is buyer's responsibility to seek updated information from the seller at various times during the transaction, including prior to closing to confirm the financials of the property have not changed. Buyer further agrees that if the financials of the property have changed, buyer will not hold Citypoint responsible.

Buyer acknowledges that Citypoint receives financial, property condition, and ownership information from sellers of the properties, and that Citypoint does not independently verify the information provided by sellers. Buyer acknowledges that Citypoint does not generate any financial, property condition, or ownership information regarding the properties. Buyer further acknowledges that Citypoint does not make any representations or guarantees regarding the financial information, property conditions, or ownership status, concerning the properties listed on Citypoint. Buyer agrees it will rely upon its attorney, tax consultants, contractors, and inspectors to confirm the financial, property condition, and ownership information of the property. It is buyer's responsibility and obligation to conduct its own due diligence, including financial reviews, property inspections, and title searches. Buyer acknowledges and understands that buyer has the right to independent attorneys, contractors, tax consultants, and inspectors and Citypoint encourages buyer to engage such independent professionals. Citypoint is solely a real estate platform that connects buyers and sellers.

Buyer agrees not to hold Citypoint liable for any information provided on Citypoint.

