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Real Estate Investment Funding Proposal

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George Ames
Senior Executive Broker
The Nolen Group
414 East Rainier Way
Spokane, WA 99203

Dear Mr. Ames,

I appreciated having the chance to speak with you over the phone this week. I am excited to move our investment venture forward and value your expertise and advice as we move forward in the funding process.

As you are aware, I have been in the real estate business for 22 years and have been investing in properties for nine of those years. I have been solely responsible for their financing, improvement, and success. I now own eight income producing rental properties. My increasing net worth shows that I am adept at finding investment properties and managing the continued investment.

To continue the growth of my business, Montgomery and Associates, Inc., I need funding from an investment company like The Nolen Group. Your commitment to the success of small businesses, along with your innovative lending program assures me that your company is the right investment firm. The flexibility, guidance, and experience that your group offers makes me confident that I can take my own investments in real estate development in the right direction.

I am positive that you will find my proposal for a 15-room hotel in Waterville, WA to be a good investment with high potential returns. I would greatly appreciate the chance to meet with your investment team as soon as possible so we can begin negotiation on the property and start the funding and development process.

Sincerely,

Jake Montgomery
President & CEO
Montgomery and Associates, Inc.
(509) 841-6623
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Proposal

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Funding a 15-room Hotel in Waterville, Washington

Prepared for: George Ames
Senior Executive Broker

Prepared by: Jake Montgomery
President & CEO



Description

Montgomery and Associates, Inc. is seeking funding from the Nolen Group for investing in a 15-room hotel in Waterville, Washington.

Our location analysis, funding request and return on investment analysis are included. We are seeking the flexibility, guidance, experience and funding your group has to offer for the growth of our business.





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Executive Summary

The Objective...

To purchase and renovate hotel property at 112 Fifth Street, Waterville, Washington.


 **Need #1:** Initial funding less twenty-five percent down payment for purchase.


 **Need #2:** Remodeling funds for renovation and construction funds.

 **Need #3:** Marketing and advertising facilitation and funding.

The Opportunity...


To own income and investment property in the historical and increasingly desirable community of Waterville, WA.


 **Goal #1:** Renovate 1884 hotel to four-star standards, but stay in keeping with the original character and atmosphere of the hotel.


 **Goal #2:** Grow and maintain reputation as luxury hotel and year-round vacation destination.

The Solution...

Form investment relationship between Montgomery and Associates and The Nolen Group to obtain funding and investment advice to support goals and outcomes.

 **Request #1:** 75% funding of 1.6 million, 5 year balloon on initial purchase price.

 **Request #2:** \$200,000.00 1-year open credit line for renovations; open balance at 1-year mark to be financed into initial loan.

 **Request #3:** Ongoing marketing and advertising campaign through The Nolen Group's innovative investment promotion program, paid monthly on cash basis.





Location Analysis

Montgomery and Associates has performed a thorough business location analysis. Following are the results.

Primary Location

Location: 112 Fifth Street, Waterville, Washington, right off scenic State Highway 2. Waterville is known for its peaceful rolling hills of wheat, views of the Cascade Mountains, historic farmsteads, and the best snowmobiling west of Montana. Waterville was founded in 1883 and is designated a historic township. The population is 1,170. Waterville is well-known for its District Fair, Rodeo, and Demolition Derby.

Description: 1884 three-story, 15-room brick hotel built on the original route for the stage coach. Building still retains many historic details, including claw-foot tubs, 11-foot ceilings, leaded glass, tin ceilings in the lobby and bar, and original unpainted wood trim. Property has had electrical updating, but will again need to be brought up to code. Plumbing needs to be updated, and some of the ceilings and walls on the 2nd floor need to be replaced due to water damage. Needs new roof and the original stage coach porch and balcony still exist, but need extensive repairs. Wood floors need to be sanded and re-stained. Historically accurate renovations need to replace all updates that occurred in the 50s and late 70s. Third floor needs extensive renovations due to water damage.

Clientele: Travelers seeking a peaceful destination in a quaint historical town. In the summer months, State Highway 2 is a popular road, and many people stop at the hotel for an overnight stay. In the winter months, snowmobiling enthusiasts travel to Waterville for its ample snow and thousands of acres of snowmobiling access.

Access: Visible from Highway 2, with access to the parking lot right off the highway.

Competition: There are no other hotels or bed and breakfasts in a 30-mile radius.

Marketing: The Town of Waterville has been featured in several local travel guides, and is becoming more well-known as travelers from larger cities seek a peaceful weekend away from the stresses of modern life. The hotel needs a broader marketing campaign to stay closer to capacity throughout the year.



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