



# PROPOSAL KIT SAMPLE

## Real Estate Investment Funding Proposal

Scroll down to read the first part of this sample. When purchased, the complete sample is 7 pages long and is written using these Proposal Pack chapters:

Cover Letter, Title Page, Table of Contents, Executive Summary, Location Analysis, Funding Request, Return on Investment

This sample was created using **Proposal Pack Concepts #4**. In the retail Proposal Pack you get the entire collection of samples (including this one) plus thousands of editable templates for creating an unlimited variety of custom proposals and other business documents.

[Click here to purchase Proposal Pack Concepts #4](#)

The sample below **does not** include all of the sample's content. The complete version is included in every retail Proposal Pack product and must be purchased to see the rest of the content and to get the editable Word format version.

Read this article for more help - [How to Write a Real Estate or Property Business Proposal](#)

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  
jake@MontgomeryDevelopment.com  
www.MontgomeryDevelopment.com



# Proposal

Montgomery and  
Associates, Inc.  
5291 NE 40<sup>th</sup> Place  
Spokane, WA 99203

(PH) (509) 841-6623  
(FX) (509) 841-6624

[www.MontgomeryDevelopment.com](http://www.MontgomeryDevelopment.com)

## 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.





# Table of Contents

Executive Summary	.....	2
Location Analysis	.....	3
Funding Request	.....	4
Return on Investment	.....	5





# 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 2<sup>nd</sup> 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.



This sample is included in the [Proposal Kit Professional](#) and [Proposal Pack](#) products.

This sample has been truncated to only show the first few pages. The complete version of this sample including an editable Word version is included with all Proposal Kit Professional and Proposal Pack products found at:

[ProposalKit.com/htm/proposal-software-products.htm](http://ProposalKit.com/htm/proposal-software-products.htm)

