|  |  |
| --- | --- |
| **Vision:** | In 20\_\_, grow your investments to increasing revenues to $\_\_\_\_\_\_\_\_\_\_\_\_\_ generating a profit before tax of $\_\_\_\_\_\_\_\_ (or \_\_\_\_ return), generating a gross income of $\_\_\_\_\_\_\_\_\_\_\_\_ in 20\_\_ with a profit of $\_\_\_\_\_\_\_\_\_ and by EOY \_\_\_\_\_\_\_\_ grow the company into a $\_\_\_\_\_\_\_\_\_\_\_\_ million entity producing a profit of $\_\_\_\_\_\_\_\_\_\_\_\_. Increase the margin from \_\_\_\_\_\_% to \_\_\_\_% over the three years, thus growing into market leaders \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |
| **Mission:** | Describe your investment objectives. I.e focus on Class B industrial properties , or class A multifamily, or focus on redevelopment of Class \_\_ properties in second tier cities in Oregon.. |

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|  | **Quarter 1** | **Quarter 2** | **Quarter 3** | **Quarter 4** |
| **Objectives** | * Achieve 20\_\_\_revenues of $ \_\_\_\_\_\_\_\_.
* Earn pre-tax profits in 20\_\_ of $ \_\_\_\_\_\_\_\_
* Refinance two properties in \_\_\_\_\_
* Buy one property in \_\_\_\_\_\_
 |  |  |  |
| **Strategies** | * Continue to focus on growing
* Work on improving revenues for all properties
* Set up system to evaluate property success
* Prepare Budget for \_\_\_\_\_\_
* Plan out the Capital improvements for the next three years
 |  |  |  |
| **Action Plan** | * Increase Marketing to Apartment owners By March \_\_
* Develop bonus system for Property Manager By May \_\_
* Identify 5 Properties to buy by April \_\_
* Develop Key property performance indicators by June \_\_
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|  | **Quarter 1** | **Quarter 2** | **Quarter 3** | **Quarter 4** |
| **Strengths** |  |  |  |  |
| **Weaknesses** |  |  |  |  |
| **Opportunities** |  |  |  |  |
| **Threats** |  |  |  |  |