

ACHIEVING YOUR PASSIVE INCOME GOAL

Your Inputs

Name: _____ Age: _____

Your ANNUAL passive income goal is \$_____.

You want to accomplish this goal in _____ years.

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OPTION 4: Income Amplifier

The options below are TRADITIONAL methods investors use. However, here's what IRIS, our technology, projects the time you need to achieve your goal.

To achieve your annual goal, using the Income Amplifier Strategy, and with the monthly contribution of \$_____ you entered, it would take you approximately:

This includes a step-by-step plan with specific milestones to make sure you are on track and does not include "Boosters" to help you shorten that timeframe.

OPTION 1: 4% Rule

Bill Bengen first devised the 4% retirement rule in 1994. This "4% rule" used by Financial Planners suggests retirees can safely withdraw an amount equal to 4 percent annually of their portfolio during their retirement.

The amount you calculated shows the portfolio value you must have to generate the passive income amount you specified.

For the **4% Rule**, you need a Target Portfolio Value of \$_____

For the **3% Rule**, you need a Target Portfolio Value of \$_____

OPTION 2: Number of Doors

In real estate investing, the phrase "number of doors" refers to the number of units you have in a particular multi-unit property or the number of rental units you have in total.

This is a common metric among real estate investors.

To achieve your goals, you need to purchase 'real estate doors' in the **RANGE** between:

_____ to _____ doors.

How much money in terms of down payment and reserves will you need for that many "doors" in your market?

OPTION 3: Capital to Have or Raise

Some people are lucky to have the capital to invest in real estate. If you are one of them, this will let you know how much you need to invest to generate your passive income goal at an assumed 8% cash-on-cash return.

To achieve your annual goal in real estate, you must **HAVE**, in your bank today \$_____

-- OR --

If you don't have the capital, but want to raise it from other investors, you must **RAISE** from other people and invest it in real estate: \$_____