

8 REAL LIFE LESSONS FOR SYNDICATORS AND THEIR INVESTORS

A hand holding a stack of money over a city skyline with a line graph overlay. The background is a teal cityscape at night with a glowing line graph overlay. The hand is holding a stack of money, and the overall scene is illuminated with a warm, golden light.

by Dave Zook

8 REAL LIFE LESSONS FOR SYNDICATORS AND THEIR INVESTORS

1. Seek Out Superstars

When you enter a new market you should always start with 1-2 really good folks.
In the beginning that is truly all you need.

Do you suppose that an excellent broker conducts business with mediocre lenders or a rookie closing attorney?
Probably not!

Great people bring a great network.

Seek out a superstar player and let them introduce you to their team.
Leverage their experience.

Never forget ~
In this business referrals are of paramount importance.
Play with the best players to up your game.



2. Team Up With The Right Team



**The Right Team Pulls Together and Everyone Pulls Their Weight.
This Drives the Success of the Team.**

Top priority on your 'to do' list for success as a syndicator, is to team up with the right team.

Always do more due diligence on the team than almost anything else.

Why?

When you choose an excellent team you will have a higher likelihood of finding excellent deals because that team will help you locate the best assets for investment and keep you on the right track.

I lean heavily on my teams to find my investors excellent assets.

Added bonus ~ An excellent team will keep you from buying bad assets.

No-one wants to go there!

3. Align By Design

As a syndicator you need to make sure your investor's goals and objectives are aligned with you and your deal.

Learn about your investor's wants, needs and desires and seek to add value to your investor.

Your ideal investor will share a common interest and hopefully also add value to your deal but the priority has to be their alignment with your potential deal at the outset.

If you don't have a deal that fits your investor's needs, be a valued referral source for someone else you trust who may be able to help them.

Let the stars align by design!



4. Pan for Gold and Don't Be Shy



You can learn about syndication in two ways:

- 1) From your own mistakes
- 2) From the mistakes of others

Learning from the mistakes of others is a lot less expensive than learning from your own.

Earnestly ask for advice. Don't be shy to seek out people who are where you want to be and ask them how they do it.

Pan for gold and look for clues to their success and ask lots of questions.

Pay attention to their answers. Simple statements are often the most informative and are always the easiest to skip over.

Don't miss out on the tiny golden nuggets of knowledge. Sieve carefully!

5. Put Your Investor First

Always focus on how the deal helps your investor. It is never about you.

When you go out into the world and seek to add value, the world recognizes and responds positively.

The job as a syndicator becomes much easier when you truly care about your investors.

Mindful engagement with your investor will reap rewards in the long term.

It will build trust and integrity in your syndication brand and your reward will be a loyal investor in your future endeavors.



6. Harness the Power of Momentum



Your first syndication deal will not be easy but it will become easier as you learn the skills you need. Your success is going to depend largely on your ability to sell.

Once you put those first few deals behind you will start to make headway especially if you have made certain you have under promised and over delivered on those deals for your investors.

Your investors will return requesting another deal from you. Hopefully they'll spread the word of their success to their friends and you'll garner some more investors as a result.

The momentum will quickly build, and syndication will become easier and easier. Everyone loves positive exponential growth.

You will be able to harness the power of this momentum to grow your wealth alongside theirs.

7. Fly High But Never Forget Your Loyal Investors

Expand your network and save room for new investors but never forget about your loyal investors. Be sure to invite them into the deal.

Never forget your investors that believed in you in the beginning. I always save a large portion of any new deal for my current investors.

It is great to fly high and put together an extended network of investors, but **always treat your 'loyal as royal'. They deserve it.**

Investors who believed in you in the first place and placed their hard earned money into your deal, should be treated with a great deal of respect. Take care of them!



8. Surround Yourself With the Right People



'The Eight Real Life Lessons for Syndicators and their Investors', are all important, but this one is a stellar lead to success.

The beginning of my journey into the dark blue deep of the real estate world, began on the Real Estate Guys Investor Summit at Sea. I specifically sought out CPA, Tom Wheelwright from Provision, Robert Kyosaki, Ken McElroy, and Robert Helms and Russ Gray from the Real Estate Guys Radio Show.

What I didn't expect on that first trip, was how much the other folks at the Investor Summit would impact my knowledge and experience during the voyage. I have found this to be true on many occasions.

On a recent trip to Belize to talk tax with a group of my investors and my personal CPA Tim Gertz (partner at ProVision) who provided a ton of value and information for us all, the solid group of folks that joined us added lots of value to the experience with their input, real life experiences and questions.

Always seek to improve and expand your network.
The benefits are significant and well worth the effort.



DAVE ZOOK

FOUNDER & CEO

Dave Zook is a successful business owner and experienced real estate investor active in the Multi-Family Apartment space and resort community development with real estate holdings in several states and several countries.

Dave and his investors own well in excess of \$100 Million worth of real estate acquired since 2009 and he has more than 3000 Multi-Family Apartments in his portfolio.

Together with his business partner Dave is a renowned and trusted professional resource in the automatic teller machine (ATM) investment market, they have deployed more than \$60 Million in investor capital and they are heavily invested personally in the ATM space.

Dave, along with his development partners is actively involved in the planning and development of the largest resort community (Mahogany Bay Village) on the Island of Ambergris Caye, Belize, which has been rated the #1 Island in the world 2 years in a row by Trip Advisor and is one of the fastest growing regions in the Caribbean. Mahogany Bay Village opened to the public in December 2017 as a Curio Collection by Hilton and is the very first branded resort on the island.

As a published author and popular guest speaker Dave has shared his knowledge at the International Business conference, The Jason Hartman Real Estate Mastermind, The Wealth Formula Podcast and the Real Estate Guys Radio show, the #1 most downloaded podcast on Real Estate Investing on itunes.

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Mahogany Bay Village, Belize



Multi - Family Apartments



ATM Investment Opportunities