



July 2019 Meeting
July 11th – 13th
At the Westin-Dallas Downtown
1201 Main Street, Dallas, TX 75202

CHECK-IN TIME FROM 9:30 AM – 10:30 AM WILLOW PAVILION (*foyer*)
PICK UP EVENT PROGRAM & NAME BADGE

Thursday, July 11th

9:30 AM – ARRIVAL, CHECK-IN & NETWORKING in WILLOW PAVILION

10:30 AM – FRED LEWIS: Opening Remarks

10:50 AM – DAMISHA WHITE: RIR Coordinator
Our Private Member Portal - Building a Resource Bank for Membership

11:15 AM – MEMBER AND SPEAKER INTRODUCTIONS:
Who Are You & What Business Are You In? Two Biz Goals – Next 12 Months

12:15 PM – BREAK

12:25 PM – MEMBER SPEAKER: Dennis Cisterna, CEO of Guardian Residential
The State of the Single Family Investment Biz: Opportunities Ahead

1:25 PM – LUNCH in WILLOW PAVILION

2:15 PM – INVITED SPEAKER: Toni Moss, CEO of Americatalyst
Scenarios of the Future

3:00 – 5:00 PM: MID YEAR 2019 BUSINESS HEALTH CHECK-UP: FULL GROUP DISCUSSION

PART A:

- **What strategy mix makes sense now?**
 - **Educator(Who & Can they Succeed), Service Provider (Lender, Ops Services), Wholesaler (the impact of the I-Buyers), Turnkey Rentals (Product Quality), Fix & Flip (Margins), Construction Services (Best Practices), Property Management (Control & Synergy), Building a RE Portfolio (Capital & Tax)**

PART B:

- What is NOT working in your business?
- What is working & strategies you will double down on going forward?

PART C:

- What was profitable in the past but has fallen off?
- What is profitable now and are you “on the clock”?
- What seeds are you planting now that could be profitable in the future?
- Are you extending your current operation or going new directions?

PART D:

- Alternative Real Estate Strategies: Example:
 - Co-Living, Assisted Living, Tiny House, Build to Rent, Development

5:00 PM: BREAK

5:10 PM: MEMBER PRESENTATIONS: Borrowing Debt for RE Deals

- Jack Bevier of The Dominion Group (Baltimore, MD): The availability of capital to the SFH Business. Is the playing field level?
- Alex Lugovoy from Dobrin Consulting (Richmond, VA): Refinance Experience with local Commercial Banks

5:50 PM DISCUSSION TOPIC: How could 2020 be different for RE Investing?

- Government Policy & Election Year
- Shortage of Labor/Staffing
- Lack of Inventory & At Higher Pricing
- Tighter Margins and Profitability Targets
- Availability of Cheaper Capital

6:30 PM BREAK

6:40 PM MEMBER PRESENTATION: Stacey & Jon Bichelmeyer from Archway Homes (Lenexa, KS) *Financials & Budgeting: Cash Flow Management & Putting Profits First*

7:15 PM DINNER & NETWORKING at Grill and Vine Restaurant on *Reception Level*

Friday, July 12th

**8:00 AM – BUFFET BREAKFAST AND NETWORKING at Grill and Vine Restaurant on
*Reception Level***

**9:00 AM – MEMBER PRESENTATION: Chris Richter, Founder of Audantic (Nationwide)
*Leveraging Data in Your Business***

**9:45 AM – DISCUSSION TOPIC: Newer Tech & Apps that You Can't Live Without
*Select Member Presentations***

10:45 AM – BREAK

10:55 AM – MEMBER PRESENTATION: Zack Wiest, Founder of PA Deals (Harrisburg, PA)

**11:40 AM – MEMBER PRESENTATION: Brian & Debbie Schroeder, St Louis, MO
*Supercharging Your Cash Flow Through Integration***

**12:20 PM – MEMBER PRESENTATION: Jeff Shadrick & Jonathan Mednick of REI
Trading, Inc. (Birmingham, AL)**

1:10 PM – LUNCH in WILLOW PAVILION

**2:00 PM – INVITED SPEAKER: Inaas Arabi, VP of PropertyWare, a Division of Real Page
*How to Maximize Your Property Management Software & What Does the
Future Look Like?***

3:00 PM – BREAK

**3:05 PM – INVITED SPEAKER: Deb Newell, Consultant at Real Time Leasing
*What You Need to Know to Run an Efficient Property Management Business***

**3:45 PM – MEMBER PRESENTATIONS: Jack Bevier of The Dominion Group (Baltimore,
MD), Dan Butler of CrestCore Realty (Memphis, TN), Alex Lugovoy of Dobrin
Consulting (Richmond, VA)
*Property Management Economics, Metrics, and Automation***

4:45 PM – BREAK

5:00 PM – INVITED SPEAKER: Joseph Viery, Managing Partner of Us Tax Advisors

5:55 PM – BREAK

6:05 PM – GROUP DISCUSSION TOPIC: **DASHBOARDS**

What are you using to track your business? What are your metrics & KPI's?

- Acquisitions, Sales: Wholesaling, Turnkey, Fix & Flip, Other
- Construction; Portfolio Ownership; Property Management
- Service Provider: Educator, Lender, Insurer

7:30 PM - DINNER & NETWORKING at Ravenna Restaurant located (across from Westin Dallas Downtown) at 115 S Field St, Dallas, TX 75202

Saturday, July 13th

8:00 AM – BUFFET BREAKFAST AND NETWORKING at Grill and Vine Restaurant on *Reception Level*

9:00 AM – MEMBER PRESENTATION: Robert Nickell, Founder of Rocket Station (Dallas, TX) *Fundamental Change Ahead & What You Need to Know*

9:40 AM – MEMBER PRESENTATION: Danny Kattan, Partner of PIA Group (Miami, FL) *Life after Selling Your Portfolio, “SELL 2 RENT” & What’s Next*

10:20 AM – BREAK

10:30 AM – GROUP DISCUSSION: Integrating “Build, Sustain, Protect” Strategies

- Cost Segregation, Bonus Depreciation, Tax Strategies
- Financials & Dashboarding
- Staffing Model & Virtual Assistance
- Culture Index w/Mark Bowlin
- Data, Tech, Automation, Efficiencies
- Alternative Investment Strategies

11:30 AM – BREAK

11:40 AM – ROUNDTABLE IMPLEMENTATION

- What “3 things” Will You Implement Tomorrow?
- “Group Synergy”: How Can We Help Each Other – sharing, organized site visits, group discounts, leveraging opportunities, co-investing

12:30 PM: ROUNDTABLE FEEDBACK for NEXT MEETING

1:00 PM: 7TH MEETING OF “RIR” IS ADJOURNED