

How to build the Data Room

Jocko, Good

<https://youtu.be/ldTMDpizis8>

Who you associate with

<https://youtube.com/shorts/8YvuAEW5YIU?feature=share>

What is a Deal room?

A deal room, also known as a data room or virtual data room, is an online repository or platform where syndicators and other parties involved in a business transaction can securely share and access documents, information, and due diligence materials related to a specific investment opportunity. It serves as a centralized hub for storing and managing critical documents and data throughout the syndication process.

As a syndicator, having a deal room is important for several reasons:

Document Organization: A deal room helps you keep all relevant documents and data related to your syndication deals in one place. It provides a structured environment to organize and categorize files, making it easier to locate and retrieve information when needed.

Efficient Due Diligence: Syndication deals typically involve multiple investors and stakeholders who need to review and evaluate the investment opportunity. With a deal room, you can streamline the due diligence process by providing secure access to essential documents, financial statements, legal agreements, property information, market research, and any other pertinent details. This facilitates transparency and helps build trust among investors.

Secure Information Sharing: Deal rooms offer enhanced security features to protect sensitive information from unauthorized access. You can control access to specific documents or folders, set permissions for different user roles, and track who has viewed or downloaded files. This level of security is crucial when sharing confidential financial information, legal documents, or proprietary data with potential investors or partners.

Collaboration and Communication: A deal room provides a collaborative workspace where syndicators can interact with investors, legal teams, accountants, and other stakeholders involved in the syndication process. It allows for efficient communication, discussions, and feedback, helping to foster effective collaboration and streamline decision-making.

Investor Confidence: By utilizing a deal room, syndicators demonstrate professionalism, organization, and transparency. It gives potential investors the impression that you take the

investment process seriously, and their interests are protected. This can enhance investor confidence and increase the likelihood of successful syndication.

Regulatory Compliance: Syndication deals often involve compliance with various legal and regulatory requirements. A deal room helps you maintain compliance by securely storing and sharing the necessary legal documents, disclosures, and reports. It also facilitates document version control and ensures that everyone involved has access to the most up-to-date information.

In summary, a deal room is a secure online platform that simplifies document management, enhances due diligence, and promotes collaboration during the syndication process. It plays a vital role in organizing information, building investor trust, and facilitating efficient communication among syndicators and stakeholders.

You will be pitching this deal to investors, and people with money need the info fast and organized.

<https://youtu.be/5Q4Vth5CnPw>

Also as soon as you start to get serious about a property
(You have made the spreadsheet)
Start a google drive folder to hold all of the information.

Watch in the video the things we have included in one of our Data room google folders.

Google drive

As we get further down the road we will make a Cashflow portal site for your property. This is an example of a Cashflow portal listing for one of our investments where the investor can click a button and go through the entire process from learning about the investment, researching details and signing docs to sending in their investment by wire.

<https://www.cashflowportal.com/offering/7d7da272ae29448382e18ba7aded809b>