

# CASH FLOW

# CLUB

BUSINESS PLAN



# EXECUTIVE SUMMARY

Cashflow Club is a group of investors focused on financial education and real estate investment. We provide resources, adapt to market changes, and offer personalized investing experiences through investment tools like Atlas.

# VISION MISSION

We aim to excel in real estate investment, enhance financial literacy, and build a network of ethical investors. Our vision includes fostering investment excellence, driving financial prosperity, supporting community development, and aiding members in achieving financial independence through education and collaboration.

The Cashflow Club offers a safe space for investors to share knowledge and experiences, providing access to educational resources and leaders in the investment field. They emphasize trust, collaboration, and transparency to achieve shared and individual investment goals.



# WE FOCUS ON

- Providing tools and knowledge for informed investment decisions
- Fostering a supportive community for profitable collaborations
- Upholding integrity and transparency for collective learning
- Prioritizing innovation and adaptability to stay updated in financial markets and technology for real estate investment.
- Focusing on community impact by promoting local development and economic well-being through investment practices.

# CLUB DESCRIPTION

## ORGANIZATIONAL STRUCTURE: DESCRIPTION OF CLUB LEADERS AND THEIR ROLES.

### Production Team Roles

- Directs overall club strategy.
- Represents the Club externally.
- Coordinates internal committees and project execution.
- Manages club finances and reports to leadership.
- Maintains meeting records.
- Handles internal communications and correspondence.

### Leadership Roles

- Club vision and mission definition
- Organizing workshops, seminars, and events
- Selecting speakers for masterminds
- Managing technology and online presence
- Facilitating discussions and idea exchange
- Promoting events in various media
- Managing sponsor and partner relationships

### Operational Strategies

- Organizes bi-monthly Zoom meetings to discuss events, speakers, new opportunities, and relevant issues.
- Hosts online networking webinars to support leadership brand growth.

### Digital Platform Activities

- Launching a new website, social networks, and graphic identity with a fresh concept.
- Live broadcasting club events on all leadership group accounts.
- Intern onboarded to fulfill creative needs.



# CLUB MEMBERS

## CLUBCORE

Club members actively participate in meetings and activities, influencing decisions. The Club serves as a meeting point and a platform for engaging with the real estate market to build a dedicated audience interested in its business ecosystem.

## ATLASTOOL

Member profiling and analysis

The Atlas tool creates individual profiles for club members, enabling personalized investment experiences by tailoring opportunities and strategies to each member's profile. It helps in understanding and catering to different types of investors within the membership, showcasing a sophisticated and analytical approach to meeting their needs and capabilities.

## UNDERSTANDING INDIVIDUAL BIASES AND REPORTS

Atlas helps members identify and understand their investment biases by offering personalized information on tendencies and preferences. It also provides reports for Club leaders and sponsors to interact effectively with members.

# MARKET AND

## MARKET ANALYSIS

- **Denver is dominated by three significant meetups:** BiggerPockets, ICOR, and Invest Success.
- Given this reality, we saw a need to create a new space for the free and open exchange of ideas. Let's be much more and better.
- The differentiating factors are that organizers have NO profit motives in the exchange of information and possess the current levels of expertise to manage manage any project.
- **Opportunities identified:** Denver, Colorado Springs, Miami, NYC, Panama, Cancun, Madrid, Caracas, and Detroit.



# OPPORTUNITIES

## MARKETING AND COMMUNICATION PLAN

- Promotion Strategies: Sarah and Jose to offer webinars in Spanish (varied topics). Record podcasts with each other (James and Toby already have one). Attend and share Jonah's digital events, among multiple other examples. Provide virtual events at least once per month.
- Social media, webinars and workshops, joint participation in social networks, and promotion of the free library of all the sessions; videos with subtitles will be available.
- Promotion of testimonials from Club attendees.
- Participate in other meetups, masterminds, ICOR, or any other event that allows the Club to be promoted.

## FINANCES

- Financing structure: Through private financing from companies in the real estate sector.
- Financial projections: These are intended to cover the event's operating costs and make it entirely self-sustaining.
- Expected returns: community building, brand building, lead generation, social media exposure, captive community exposure.



# WHAT IS A PARTNER?

Club partners offer significant financial and resource support, aiding in the Club's growth and sustainability. They contribute to strategic decisions and may serve on committees or the board of directors, influencing the Club's direction.

# DIFFERENT LEVELS OF PARTNERSHIP AND WHAT EACH INCLUDES



## SILVER

Partner Directory on Website and Meetup, Social Media Promotion, Preferred Provider, Shoutout at each event (\$1,200/year)



## GOLD

Silver + 5 Minutes Presentation + Email Blast to Attendees each month (\$2,500/year)



## PLATINUM

Gold + 20 minute Presentation 1/Q + Branding on Handouts (\$5,000/year). Exclusive representation in your field.

### Commitments and Expectations:

As a club partner, you play a vital role in supporting the Club's mission and vision, providing resources for its effective operation and growth.

### The Objective of the Partnership:

Cashflow Club aims to share real estate investment knowledge, with a financial goal of creating a sustainable operation to cover operating costs and meet annual budgets.

# BENEFITS OF THE PARTNERSHIP

## Brand recognition:

- Logo on marketing and advertising material of the brand.
- Mentions in newsletter and social media.
- Advertising space on the Club's or event's website.

## Exclusive access:

- To gain early access to investment opportunities, we will create an exclusive communication channel where we can post our deals. Suggestions for the best channels are welcome.
- Invitations to private members-only or VIP events. For example, LAM dinner with ConciergeAuction.com
- Opportunities to meet and network with industry leaders and other high-profile sponsors -- if we have an established event schedule, we can invite industry personalities.

## Improved visibility:

- Opportunity to be the main sponsor of specific events or activities. Development of topics related to the services provided by. For example, “How to Work with Hard Money Lenders,” when the special sponsor of the event may be a hard money lender.
- Inclusion on all event or club facility signage (Platinum Level)
- Possibility to make a presentation or speech at events.

## Social and community impact:

- Partnership with club-supported community and charitable initiatives.
- Recognition as a sponsor of corporate social responsibility programs.

**Compatibility with the Club's mission: Partners should demonstrate a genuine interest in the Club's focus areas, such as real estate investment, cash flow generation, and investment strategies.**

- Commitment to business ethics and integrity.
- Proven track record in relevant areas: We require partners to have experience in investment, finance, or related industries.

# BENEFITS OF THE PARTNERSHIP

## Data and analysis:

- Access to club member information. (Platinum level)
- Access to detailed reporting and analysis on the impact of events, including attendee demographics and engagement levels.
- Access to data and the Atlas Point platform: This technology and the reports generated are available to ordinary members and Partners. This detail underscores an additional benefit for high-level patrons, who receive access to deeper analysis and information because of their investment and commitment to the Club. This allows them to understand the Club dynamics better and identify strategic investment opportunities based on members' profiles and investment trends.
- Surveys and direct feedback from participants about the event.

## Market positioning:

- Association with a prestigious Club or event that enhances brand awareness.
- Differentiation from competitors who are not involved in similar sponsorships.

## Partner obligations

- Agree to one of the packages.
- Sign a partnership agreement
- Alignment of Values and Interests
- Help in promotion: Partners are expected to help promote the Club within their networks and platforms, increasing its visibility and appeal.

**Compatibility with the Club's mission: Patrons should demonstrate a genuine interest in the Club's focus areas, such as real estate investment, cash flow generation, and investment strategies.**

- Commitment to business ethics and integrity.
- Proven track record in relevant areas: We require employers to have experience in investment, finance, or related industries.

# JOIN THE

# MOVEMENT

BECOME A PART  
OF THE  
CASHFLOW CLUB