

Building Wealth With Real Estate



For nearly a decade, many Americans have felt real estate is the best long-term investment.¹ Single-family homes, condos, townhouses, multi-family homes, ADUs (accessory dwelling units) or vacant land are all options to consider if you decide to invest.

Benefits of Investing in Real Estate

1. Tax Incentives

You may be eligible for certain tax breaks and deductions.

2. Extra Income

After your monthly expenses are deducted from the rental payment, there may be additional income left.

3. Leverage Funds

Real estate investments can be financed through mortgages and other financing options, allowing you to leverage your capital and amplify returns.

4. Hedge Against Inflation

Real estate historically keeps pace with inflation.

5. Equity and Appreciation

Real estate properties tend to appreciate in value over time, allowing investors to build equity and accumulate wealth.

6. Portfolio Diversification

Adding real estate to a portfolio of diversified assets can lower portfolio volatility and provide a higher return per unit of risk. It is also not affected by fluctuations in the stock market.²

As with any investment, thorough research, careful planning and professional guidance are crucial to maximize returns and minimize risks. Always consult your trusted tax professional or financial advisor.

3 Terms to Know



Fair Market Value (FMV)

The price that a willing buyer would pay a willing seller for a home in an open market. The FMV is agreed upon by both parties, who are knowledgeable about the property.³

Investment Value

The amount an investor is willing to pay to obtain an asset or investment. It is based on their subjective goals, criteria, and opinions about the asset.⁴

Return On Investment (ROI)

Measures the profit you have made (or could make if you were to sell) on an investment. It is calculated by comparing the amount you have invested in the property, including the initial purchase price plus any further costs, to its current value.

I know the market can be confusing, but I am here to offer clear, concise information you can trust. Feel free to contact me and I will answer any questions you may have.