REI INSTITUTE™ | REAL ESTATE INVESTMENT INSTITUTE™

REIS™ CURRICULUM OVERVIEW

This is not just a course about investment properties. It's about the fact that every transaction agents handle is a financial decision — usually the largest one that client will ever make. A first-time buyer, a couple deciding whether to move up or renovate, a retiree sitting on thirty years of equity: none of them think of themselves as investors, yet each is deciding with decades of financial consequence.

A 3-Phase (10-Unit) learn-at-your-own-pace training system. By the end, you won't just know more about real estate — you'll be able to walk into any client conversation and lead it, starting with the one asset every client already owns: their own home.

PHASE 1: FOUNDATIONS — HOW REAL ESTATE BUILDS WEALTH

Unit 1 — Wealth Fundamentals

- Show a client how their own principal residence is already working for them — instant equity, market appreciation, forced savings through every mortgage payment, and a capital gain that can come home completely tax-free — the catalyst insight that opens every wealth conversation you'll ever have, with every client you already know
- Recognize which of your current clients are already sitting on untapped equity — be the first agent who ever pointed it out — and start turning knowledge into trust
- Show a client how a cash-out refinance lets them redeploy that equity without giving up the home they already have, the kind of moment that turns one deal into many, years down the line
- Know exactly which questions separate a client who's ready to act from one who's just curious — spend less time chasing dead ends, more time building real client loyalty

Unit 2 — The Strategy Playbook

- Match a client's goals to the right strategy — flip, hold, BRRRR, house hack — become their go-to agent for every deal after this one, not just this one
- Speak fluently about strategy options for every client — turn knowledge into trust, and trust into the referral that follows
- Close deals other agents walked away from

Unit 3 — Property Analysis Fundamentals

- Screen a deal in under two minutes using quick-analysis techniques — look like you already know the answer before the client finishes asking
- Walk a client through real cash flow and ROI numbers, not guesses — turn that confidence into trust, and trust into the next referral
- Know which lenders to bring into a deal — one more reason a client makes you their go-to agent

"The best real estate decisions are made with a calculator, not a crystal ball."

PHASE 2: ADVANCED ANALYSIS & TEAM BUILDING

Unit 4 — Advanced Deal Math

- Show a client their refinance or exit options at the 5-year mark — the client loyalty that brings them back to you, not a stranger
- Demonstrate a buy-fix-sell opportunity using private lending when conventional financing fails — win deals other agents simply lose
- Walk a client through an advanced BRRRR strategy step by step — the expertise that turns one deal into many, as their portfolio grows

Unit 5 — Advanced Analysis

- Explain the real difference between a cash-out refinance and a HELOC — respect that outlasts closing day
- Understand how to qualify a rental property using GDS/TDS and current rental-offset rules when personal income alone won't cut it — save deals another agent would have lost
- Calculate and interpret cap rates on the spot, in front of a client — the moment knowledge turns into trust

Unit 6 — Building Your Client's Power Team

- Hand a client vetted mortgage brokers, private lenders, real estate lawyers, inspectors, property managers, contractors (and more) — be the one call that solves the whole deal
- Ask the right vetting questions instead of hoping a referral works out — protect the client loyalty you've already earned
- Build a repeatable process for assembling a deal team — the reliability that makes you the go-to agent, deal after deal

Unit 7 — Positioning Yourself as the Real Estate Wealth Advisor

- Shift a conversation from "let's find you a house" to "let's build your wealth" — turn a one-time buyer into a client for life
- Build a personal brand and value proposition that positions you as a Real Estate Wealth Advisor — become the go-to agent people ask for by name
- Run a real one-on-one portfolio review using a proven script — turn trust into business before the deal even closes

"When you help people see real estate differently, they start seeing you differently."

PHASE 3: SCALING INTO BIGGER DEALS

Unit 8 — Corporate Structures & Joint Ventures

- Understand business options such as corporations, partnerships, and trusts well enough to prepare a client before they meet their accountant — the trust that gets you handed bigger and bigger deals
- Recognize when a joint venture or syndication is the right move — get invited into deals other agents never even hear about
- Understand what a client's lawyer is actually checking for — one more way to gain a serious client's confidence

Unit 9 — Uncommon Strategies

- Recognize a land assembly or development opportunity when it crosses your desk — see deals most agents never even know exist
- Walk a client through construction and rezoning-dependent financing with real project math — become the agent developers actually call
- Understand how to locate, create and transact deals OFF the MLS.
- Spot the acquisition opportunities a zoning change creates — be first to the deal, before it's competitive

Unit 10 — Commercial Real Estate

- Confidently field a client's first commercial property questions — keep the deal or refer it — your qualifying conversation helps the client, builds client loyalty, and sets up the commercial agent to succeed
- Read and explain a commercial lease structure — turn one deal into many, as their portfolio grows into commercial
- Understand commercial property financing well enough to prepare your client for that journey — so helping them get there doesn't mean losing the relationship
- Position yourself as the Real Estate Wealth Advisor clients call for their next step up — the go-to agent for life, not just for one deal

FINAL EXAM

REIS™ Certification Exam

Pass it, and you've earned the Real Estate Investment Specialist™ (REIS™) designation — that's the credential. Day to day, you'll show up for clients as their Real Estate Wealth Advisor.

Includes:

- **A Unit-by-Unit Marketing Kit** — a quote to post, a text to send your network, a script for a quick video — built around what you just learned in that unit. Learn it, then publish it, the same day.
- **Pro Tools** — professional-grade tools to confidently analyze any property, on the spot, in front of a client, scripts, due diligence checklists, and more

BEYOND CERTIFICATION: JOIN THE ECOSYSTEM

Earning your REIS™ designation isn't the finish line — it's the entry point into a national community of Real Estate Wealth Advisors who keep sharpening the same conversation, together. Certification gives you the language. The ecosystem is what keeps you using it.

INCLUDED WITH YOUR CERTIFICATION

- **Weekly Live Group Coaching** — bring your questions, work through real client conversations, bring real deals, and role play, hosted by the REI Institute team
- **Monthly Masterminds** — industry expert interviews, and networking with other REIS™ Real Estate Wealth Advisors
- **Your 90-Day Success Map** — a week-by-week plan for your first 90 days as a certified REIS™ Real Estate Wealth Advisor, so you know exactly which clients to call, which content to publish, and which deal to chase first — no blank calendar the week after your exam
- **Implementable Monthly Marketing Assets** — tailored for prospecting, qualifying, and following up on the wealth-building conversation, ready to use the day you're certified
- **Dedicated Community Forum** — a national network of REIS™-certified agents to ask questions, share wins, and swap what's working
- **REIS™ Directory Listing** — a public, searchable listing that signals to clients you're the Real Estate Wealth Advisor in your market

AVAILABLE AS A PAID ADD-ON: ONGOING COACHING

Want more than the tools — want someone in your corner every week? Want to build a consistent done-for-you/with-you marketing system? REIS™ grads can add ongoing coaching separately

The REIS training result isn't just a designation on your business card. It's more conversations that lead somewhere, more clients who come back before you have to chase them, and more deals per client — because you're the one Real Estate Wealth Advisor in their life who can explain what their equity is already doing for them, and what options they can consider next.