Investor Trust Worksheet

SECTION 1: Business Plan vs. Reality Check

Use this section to evaluate where your current project stands against your original plan.

Timeline	Original Target	Current Status	Variance	Notes
CapEx Budget				
Occupancy/Leasing				
Rent Roll				
Other KPIs				

SECTION 2: Monthly Investor Update Template

Keep investors informed with a consistent update structure.

Topic	Details
KPI Summary	
Photos of Progress	
Risk Reframes	
Next Month Plan	

SECTION 3: Incident Response Draft

Use this section to role-play handling a delay or shortfall.

Incident	Root Cause	Mitigation Plan	Investor Message

SECTION 4: Optimization Audit

Small improvements that grow NOI.

Area	Optimization Idea	Expected Impact
Tenant Retention		
Cost Control		
Revenue Growth		
Rent Roll		

SECTION 5: Exit Strategy Timeline

Build clarity and investor confidence with clear timeline planning.

Milestone	Trigger	Expected Date	Notes
Refinance			
Sale			
1031 Exchange			

SECTION 6: Thank You Letter Template

Instructions