Investor Relations Calendar

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Thank-You + Replay Email	Update Type	Content Focus	Status	Notes
January	Newsletter	Construction Progress		
Q1	Webinar	Financial Review & Q&A		
Ad-Hoc	Email Alert	Lease-Up Complete		

Investor Persona Worksheet

Investor Name	Preferred Communication	Key Goals	Risk Profile	Personal Notes

Feedback Loop Templates

Touchpoint	Method	Frequency	Question/Prompt	Notes
Post-Distribution Survey	Google Form	Quarterly	How satisfied are you with your distributions?	
Open Q&A	Webinar	Quarterly	What else would you like to see from this investment?	

Celebration Plan Template

Milestone	Date	Communication Channel	Message Type	Celebration Idea
Refinance Closed	Google Form	Email	Announcement	Bonus distribution + update video
Full Lease-Up	Webinar	Social Media	Highlight	LP Shout-out + photo recap