First Deal Team Builder Worksheet

Use this worksheet to build, track, and optimize your real estate investment team for your first deal after 50. This tool will help you stay focused, intentional, and empowered as you take action.

Step 1: Identify Your Core Team Members

Start by listing your team members under each role. Leave blank any positions you're still working to fill.

Role	Name	Phone/Email	Notes
Mentor / Coach			
Real Estate Agent / Wholesaler			
Lender / Funding Partner			
Real Estate Attorney			
Inspector			
Contractor / Handyman			
Property Manager			
CPA / Tax Advisor			
Encourager (Spouse, Friend, etc.)			

Step 2: How Will You Add Value to Your Team?

Even if you're just starting, here's how to be seen as a serious, reliable partner.

■ Show up on time to meetings and calls.

■ Be honest about what you know—and don't know.

■ Take notes and follow up promptly.

■ Respect everyone's time and expertise.

■ Show appreciation and gratitude.

■ Do what you say you'll do, when you say you'll do it.

■ Ask: 'How can I make your job easier?'

Step 3: Track Your Progress

Use this tracker to document your outreach and results as you build your dream team.

Date Contacted	Who Did You Contact?	Result / Notes	Follow-Up Needed?