

Creating YOUR Successful Exit Strategy

For Property Managers

A real estate course designed to encourage each and every property manager to practice at their “highest level” of service and integrity with a focus on creating a sellable business.

Mark Given Seminars, LLC®

markgiven.com

INTRODUCTION

The *Creating Your Successful Exit Strategy Course* is a one (1) hour elective course that may be completed by all agents and brokers who are seeking to complete (1) hour of VA Elective requirement.

This one (1) hour elective course will include 60 minutes of classroom or virtual instruction and no breaks.

Comments and Complaints

This course, developed by Mark Given of Mark Given Real Estate Seminars, LLC, may be conducted only by Mark Given. Any other instructor must have written approval from Mark Given Real Estate Seminars, LLC in writing.

Comments and complaints about the course or the instructor may be directed in writing to:

Mark Given Real Estate Seminars, LLC

P.O. Box 1460

Roanoke Rapids, NC 27870

Email address: markgivenseminars@gmail.com

Description

There is currently a very large number of property management professionals reaching the point of slowing down or retiring. This course is designed to assist those owners and managers in creating a successful exit strategy while still encouraging them to focus on a high level of customer representation and protection.

Course Objectives

Upon successful completion of this course, you will be able to:

1. Define and describe the needs and wants of clients for your unique market and scenario.
2. Analyze and assess the “what”, “how”, and “why” of clients’ needs and wants, then modify and apply your actions and behavior to better serve your clients and reduce discriminatory acts and disciplinary actions.
3. Identify a higher level of acceptable standards and habits to critique your daily activity and design steps to personal improvement with a focus on creating a saleable business.
4. Increase consumer protection by assessing your skills, practices, and habits within real property categories and transactions.
5. Design and demonstrate improved forms of consumer representation and communication with a focus on creating a saleable business.

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This course will meet the objectives listed above through a combination of the following activities:

The Outcomes of this course will be met through student examination, participation, discussion, and involvement activities including Q & A, breakout sessions, and lecture. A power point presentation is provided for visual understanding and clarity.

Course Introduction - The course opens with a short 1-minute turn to your neighbor discussion followed by a 4-minute open conversation about the student's attitudes and experiences with building their business and serving their customers and clients.

Understanding the value in serving their customers well – The Value of Your Database

This course will meet the objectives listed above through a combination of the following activities:

The Outcomes of this course will be met through student participation, discussion, and involvement activities including Q & A, breakout sessions, and lecture. A power point presentation and student materials are provided for visual understanding and clarity.

Course Introduction - The course opens with a short 2-minute turn to your neighbor discussion followed by a 5-minute open conversation about the student's attitudes and experiences with building their business and serving their customers and clients.

This entire 60-minute section taught in a lecture, Q & A, and workshop format will teach the student a better understanding of business-building skills and responsibilities necessary to build the business and sell their business by better serving their clients and customers and creating systems and processes that will make their business ready to sell.

Course Objectives

At the conclusion of this course, the student will be able to:

- *Refer to master books and printed sources of material for now and future learning
- *Begin creating an exit strategy
- *Write a short list of achievable goals
- *Write a date to seriously begin their exit strategy
- *Consider which stage they will need the most focus to begin implementation
- *Understand the importance of a business plan

PROPERTY MANAGEMENT EXIT STRATEGY CHECKLIST

1. Planning Your Exit

- ✓ Choose the date for retirement or transition
- ✓ Decide whether to sell, transfer, or phase out the business
- ✓ Determine if you'll maintain any advisory or consulting role
- ✓ Communicate your exit timeline to stakeholders (owners, tenants, vendors)

2. Client & Property Portfolio Assessment

- ✓ Categorize your client portfolio – A/B/C/D (most valuable properties and relationships)
- ✓ Prioritize accounts – apply the **80/20 rule** (which clients generate the most revenue or require the most attention)
- ✓ Quantify top clients (value of individual owners, tenants, and service contracts)
- ✓ Assess vacancy rates and lease expiration timelines
- ✓ Review rent collection consistency and delinquency trends

3. Financial & Legal Considerations

- ✓ Decide between a **flat fee buyout** or **term buyout** structure
- ✓ Structure a term buyout (total years, payment terms per year)
- ✓ Consult legal professionals to draft buyout agreements
- ✓ Address tax implications for ownership transition
- ✓ Review outstanding debts, accounts payable, and security deposits
- ✓ Ensure leases, service contracts, and property documents are transferable

4. Successor Selection & Transition

- ✓ Identify the individual or company that will take over management
- ✓ Vet candidates through experience, licensing, and track record
- ✓ Establish compensation structure (salary, commission, bonuses, equity options)
- ✓ Define the successor's responsibilities and management style
- ✓ Outline integration plan for successor—introduce to clients, vendors, and tenants
- ✓ Communicate transition details to property owners and ensure continuity

5. Team & Operational Structure

- ✓ Do you need a management team? Do you have a team? Who's on it?
- ✓ Identify key staff to retain or transition

- ✓ Define roles post-exit (who will handle rent collection, maintenance, owner relations?)
- ✓ Assess whether to restructure operations for efficiency

6. Contracts & Agreements

- ✓ Draft buyout terms (legal, financial, transfer of leases and service agreements)
- ✓ Establish **non-compete clauses** if selling the business
- ✓ Define referral terms and future compensation for introductions
- ✓ Address liability coverage during and after the transition

7. Future Referral & Growth Plans

- ✓ Determine referral partnership structure for agents and brokers
- ✓ Develop tiered transition for property owners (VIP, standard, economy portfolios)
- ✓ Define how future property owners or tenants will be referred to the successor
- ✓ Consider a **gradual phasing out** to maintain stability

8. Marketing & Business Development Systems

- ✓ Review current marketing strategies (advertising vacancies, owner acquisition)
- ✓ Document what marketing channels are effective and their costs
- ✓ Provide the successor with operational systems for acquiring new clients

9. Property Management Processes

- ✓ Standardize tenant screening and lease processing workflows
- ✓ Review rent collection methods and financial tracking systems
- ✓ Define maintenance and vendor management protocols
- ✓ Ensure property inspections and compliance requirements are met

10. Communication & Final Transition Steps

- ✓ Notify all stakeholders (clients, owners, tenants, vendors) about your transition
- ✓ Provide the successor with documented policies and procedures
- ✓ Ensure a **smooth transfer** of financial accounts, leases, and contracts
- ✓ Conduct final meetings with key clients and property owners
- ✓ Exit with a strong reputation, maintaining goodwill for potential future endeavors

Notes _____

The impact that a change of ownership may have on securing future business = YOU being the Rainmaker

Assimilation _____

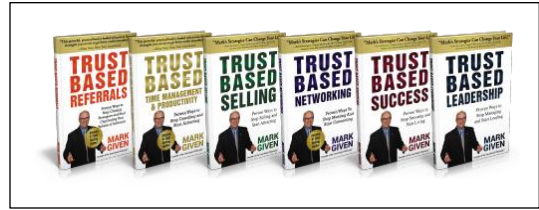
4 Key Pieces to a Successful Exit Strategy

1. _____
2. _____
3. _____
4. _____

Notes _____

Mark Given

*Founder of the Trust Based Philosophy
and the Trust Based Academy*



The Speaker

Mark has spoken or taught at more than 2000 events, classes, keynotes, radio shows, and podcasts from Hong Kong to London over the past 20 years on Leadership, Networking, Personal and Business Success, and Trust Based Selling systems and has shared his philosophy with many hundreds of thousands of people and hundreds of businesses across the world.

The Author - Mark is an Amazon #1 Bestselling Author of 12 books, including the Amazon #1 Bestselling book "Finding My Why Ernie's Journey". He

is known internationally as the Author of the Bestselling **Trust Based Philosophy** book series. His personal blog, "Mark's Minute," is read by thousands of people across the world every Wednesday. Mark feels blessed to have the opportunity, nearly every week, to share easy lessons that grow people, their businesses, and their lives so they can improve their future and get the results they are seeking.

The Person

Mark grew up in a rural Ohio town, headed to North Carolina to finish college, and resides in a small NC community with his wife of 47 years. Together, they have raised 5 great kids and pray that they might inspire their 14 grandchildren (that are nearly perfect in every way)! Mark and Gigi's four sons are all Eagle Scouts, one son is a serial entrepreneur, one is a dentist, and two are customer relations experts for a Pepsi Cola and Hilton Hotels. Mark's daughter Kerri is a Hospitality Management graduate, stay at home mother, and is Mark's VP of Marketing.

The Businessman

After his education at The Ohio State University and Elon College, Mark spent 20 years as CEO of a multi-state retail sales and rental company that grew to 47 locations. He has invested the past 26 years as a philosopher, speaker, teacher, coach, and Author. All along the way, Mark has invested tens of thousands of hours teaching life and business changing **Trust Based Philosophy** systems, Leadership skills, Sales skills, and Success systems with organizations just like yours and people just like YOU across the world.



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Mark Given's Current Recommended Reading List

(In no particular order)

1. How to Win Friends & Influence People – Dale Carnegie
2. As a Man Thinketh – James Allen
3. The Ai-Driven Leader – Geoff Woods
4. The Slight Edge – Jeff Olson and John David Mann
5. The On-Purpose Person – Kevin McCarthy
6. The Power of Habit – Charles Duhigg
7. Key Person of Influence - Kevin Harrington
8. The Answer – John Assaraf & Murray Smith (first 100 pages)
9. The Seven Spiritual Laws of Success – Deepak Chopra
10. Exactly What to Say – Phil M Jones
11. The Message of a Master – John McDonald
12. Mastery – George Leonard
13. The Traveler's Gift - Andy Andrews
14. Standing For Something – Gordon B Hinckley
15. The Ultimate Gift - Jim Stovall
16. The 5 Second Rule - Mel Robbins
17. Man's Search for Meaning – Victor Frankl
18. Build For Tomorrow – Jason Feifer
19. The Checklist Manifesto – Atul Gawande
20. Finding My Why, Ernie's Journey-A Tale for Seekers – Mark Given & Don Greeson
21. The Richest Man in Babylon – George S. Clason
22. Winning – Jack and Suzy Welch
23. Ziglar On Selling – Zig Ziglar
24. Golden Rules - Napoleon Hill
25. The Success Principles – Jack Canfield
26. Think Again – Adam Grant
27. The Power of the Subconscious Mind – Joseph Murphy
28. The Go-Giver series of books – Bob Burg and John David Mann
29. Who Will Cry When You Die – Robin Sharma
30. 10X Is Easier Than 2X – Dan Sullivan
31. Think and Grow Rich – Napoleon Hill
32. The Common Path to Uncommon Success - John Lee Dumas
33. Trust Your Gut - Lynne Robinson
34. Trust Based Philosophy books (8 of them so far) – Mark Given

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