

# Personal and Professional Wealth Management



## My Passion for Wealth Management

- Covid Stock Market boom sparked a serious interest in Financial Markets
- Wealth management is critical for post employment income
- **Financial Industry Regulatory Authority**
- Securities Industry Essentials Exam ✓
- Series 66 Uniform Combined State Law Exam ⌚
- Sponsorship for certification exams
- Securing Employment at a broker-dealer
- Series 7 - General Securities Representative
- Series 79 - Investment Banking Representative

- Objectives:
1. Pursue a career in wealth management
  2. Purchase a house with the purpose of renting to college students



TOO COLD !

## My Father's Foray into Real Estate

### Key Aspects

- Preservation of Capital
- Up and Coming Rochester Housing Market
- Utilizing Zillow
- Real Estate Agents and Tours
- Tight Supply and High Demand
- Delayed Negotiations

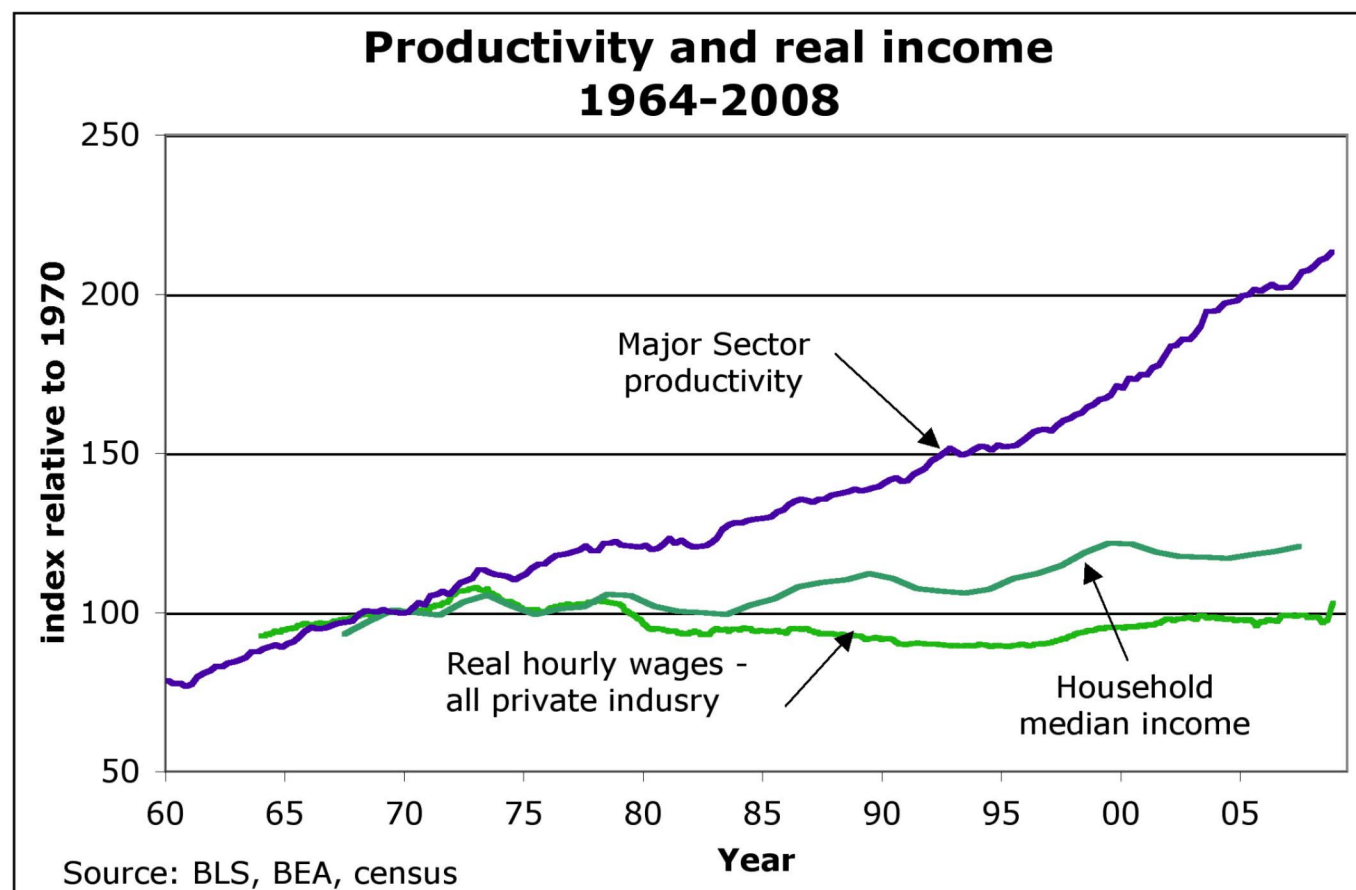


TOO HOT !

### Requirements

- Within budget (\$250,000)
- Minimum 4 bedroom home to generate adequate rental income.
- Location near UofR or RIT
- House requires minimal/no repairs to ensure the property can be utilized ASAP

JUST RIGHT ✓



Locations Viewed: 100+

Locations Toured: 15+

### Notable Locations:

Address	Amenities	Year Built	List Price	Proximity	Misc.
640 Gensee St.	5bd2ba	1900	\$130,000 *	19 <sup>th</sup> Ward	Inspection ruled it out
43 Comfort St.	4bd2ba	1900	\$195,000 *	South Wedge	Outbid
11 Maria St	8bd4ba	1910	\$220,000	Upper Falls	Unkept and patched up
31 Grape St.	6bd3ba	1890	\$125,000*	Charles House Area Council	Buyer waived inspection
713 Post Ave.	4bd2ba	1925	\$160,000	19 <sup>th</sup> Ward	Moldy and unmaintained
48 Remington Pkwy.	3bd2ba	1921	\$150,000	N of RIT	Small and unmaintained
81 Arvine Heights	4bd2ba	1927	\$160,000*	19 <sup>th</sup> Ward (S of Brooks Ave)	Too good to be true
152 Weldon St.	4bd2ba	1910	\$175,000**	19 <sup>th</sup> Ward (S of Brooks)	Pending closing