

# HOW TO USE ELANCE TO CREATE YOUR PITCHBOOKS QUICKLY AND EASILY

## FUNDRAISING FUNDAMENTALS BLUEPRINT

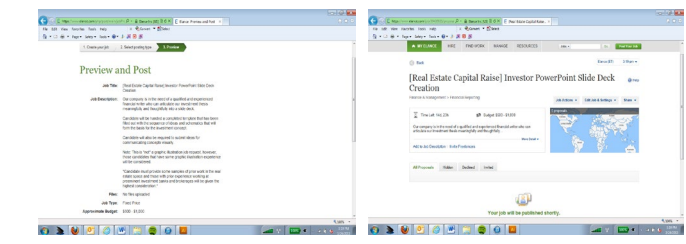


### STAGE 1: Posting Your Project

You'll need to go to Elance.com to open an account. It doesn't cost anything to do. It will take some time as they will need to do some verifications with your credit card, similar to what PayPal™ does when you open an account or link a new account. Generally, they will deposit a few cents in to your account in 2 separate transactions. Then they will ask you how much was deposited. Then you're off to the races. Your Job Description:

**TITLE: [Real Estate Capital Raise] Investor PowerPoint Slide Deck Creation.** Our company is in the need of a qualified and experienced financial writer who can articulate our investment thesis meaningfully and thoughtfully into a slide deck. Candidate will be handed a completed template that has been filled out with the sequence of ideas and schematics that will form the basis for the investment concept. Candidate will also be required to submit ideas for communicating concepts visually. Note: This is \*not\* a graphic illustration job request, however, those candidates that have some graphic illustration experience will be considered. Final Products Are As Follows: 1) a 2-page tearsheet that highlights the high points and terms of the deal, and 2) a slide deck pitchbook that sufficiently communicates the thesis comprehensively. \*Candidate must provide some samples of prior work in the real estate space and those with prior experience working at preeminent investment banks and brokerages will be given the highest consideration.\*

**Don't forget to attach your completed Fundraising Fundamentals Workbook to the jobpost.** This is critical as your writer will need a base to work with! Otherwise they will have nothing to work from. <https://dandrew.infusionsoft.com/saleform/nathniuru>



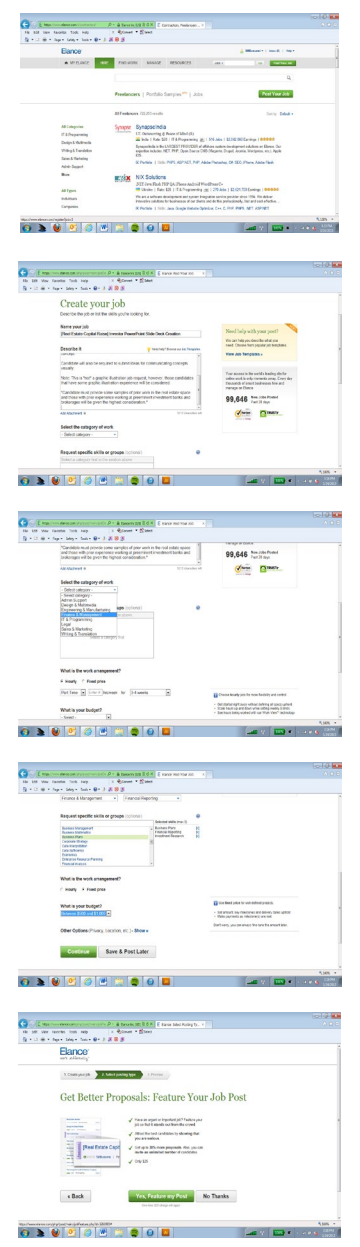
### STAGE 2: Qualifying Candidates

Almost immediately, you'll start seeing some candidates start submitting proposals to you. **Be patient!** Give it a day or so because experience tells us that the really good contractors are often busy and are not busy checking for new jobs until they complete what they have currently on their plate.

© The Commercial Investor and Dandrew Partners, LLC. All Rights Reserved.

**COPYRIGHT AND TRADEMARK INFORMATION**  
THIS PRODUCT AND ASSOCIATED MATERIALS (COLLECTIVELY REFERRED TO IN THIS AGREEMENT AS "PRODUCT") IS COPYRIGHTED BY THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC. ALL RIGHTS RESERVED.  
WARNING: FEDERAL LAW PROVIDES SEVERE CIVIL AND CRIMINAL PENALTIES FOR THE UNAUTHORIZED REPRODUCTION OR PUBLIC DISTRIBUTION OR EXHIBITION OF COPYRIGHTED MOTION PICTURES, VIDEO TAPES, OR VIDEO DISCS AND OTHER CREATIVE CONTENT.  
THIS PRODUCT IS PROTECTED BY TITLE 17, UNITED STATES CODE, INCLUDING BUT NOT LIMITED TO, SECTIONS 501, 504, AND 506, "HOW TO USE ELANCE TO CREATE YOUR PITCHBOOKS QUICKLY AND EASILY", THE NAME OF THIS PRODUCT, THE STYLIZED VERSIONS OF THESE, AND "THE COMMERCIAL INVESTOR", "DANDREW PARTNERS" LOGO ARE ALL TRADEMARKS OF THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC, RESPECTIVELY.

**DISCLAIMER AND RELEASE FROM LIABILITY**  
YOU UNDERSTAND AND AGREE THAT THE INFORMATION CONTAINED IN THIS PRODUCT IS FOR YOUR PERSONAL PURPOSES ONLY. STATEMENTS MADE AND CONCEPTS CONVEYED THROUGHOUT THIS PRODUCT ARE PERSONAL OPINIONS ONLY. THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC, AND THE AUTHOR MAKE NO REPRESENTATION OTHERWISE. YOU ARE RESPONSIBLE FOR YOUR OWN BEHAVIOR AND CONDUCT. NONE OF THE MATERIAL CONTAINED HEREIN IS TO BE CONSIDERED LEGAL OR PERSONAL ADVICE. THIS PRODUCT IS PROVIDED "AS-IS" WITHOUT ANY WARRANTIES OF ANY KIND WHATSOEVER (EITHER EXPRESSED OR IMPLIED) AND YOU ALONE ASSUME ANY AND ALL RISK ASSOCIATED WITH USE OF THIS PRODUCT. BY PURCHASE AND/OR USE OF THIS PRODUCT YOU WAIVE ANY CLAIM WHATSOEVER AGAINST AND HOLD HARMLESS THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC, AND ANY OF ITS OFFICERS, STAFF, ADVISORS, REPRESENTATIVES, OR DESIGNEES THAT MAY ARISE FROM SUCH USE. THIS WAIVER SPECIFICALLY ALSO INCLUDES BUT IS NOT LIMITED TO ANY CLAIM ARISING FROM A PRODUCT AND/OR SERVICE WHICH YOU PURCHASE FROM THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC, OR ANY INFORMATION YOU RECEIVE VIA POSTAL MAIL, E-MAIL, FAX, OR OTHERWISE. THIS INCLUDES BUT IS NOT LIMITED TO RESPONSIBILITY FOR THE ACCURACY OR COMPLIANCE WITH ANY APPLICABLE LOCAL LAWS. NEITHER THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC, NOR ANY OF ITS OFFICERS, STAFF, ADVISORS, REPRESENTATIVES, OR DESIGNEES SHALL BE LIABLE IN ANY WAY WHATSOEVER (INCLUDING, BUT NOT LIMITED TO, NEGLIGENCE) FOR ANY DIRECT, SPECIAL OR CONSEQUENTIAL DAMAGES RESULTING FROM EITHER YOUR USE OF THIS PRODUCT OR YOUR INABILITY TO USE IT EVEN UNDER ANY CIRCUMSTANCE IN WHICH THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC, OR ANY OF ITS REPRESENTATIVE(S) HAVE BEEN ADVISED OF POTENTIAL LIABILITY, DAMAGES, OR INJURY. CERTAIN APPLICABLE LAWS MAY NOT ALLOW ALL THE LIMITATIONS OF LIABILITY DESCRIBED HEREIN. TO THE EXTENT THAT ANY OF THE ABOVE REMEDIES AND/OR LIMITATIONS SHOULD BE DEEMED TO FAIL OF THEIR ESSENTIAL PURPOSES, YOU AGREE THAT THE COMMERCIAL INVESTOR AND DANDREW PARTNERS, LLC TOTAL LIABILITY TO YOU UNDER ANY CIRCUMSTANCES WHATSOEVER, INCLUDING BUT NOT LIMITED TO LOSSES, DAMAGES, CAUSES OF ACTION, AND/OR NEGLIGENCE SHALL NOT EXCEED THE TOTAL MANUFACTURER'S SUGGESTED RETAIL PRICE OF THIS PRODUCT AT THE TIME OF PURCHASE.



### How We Are Going To Be Qualifying These Proposals:

**1. Where They Are Based.** Ideally we want US-based (New York City, preferably) or UK-based. Both have strong and competitive financial centers with preeminent investment banks and brokerages.

**2. Samples Of Recent Work.** First, we're going to want to see what they've done in the past to see if it is a good fit. Second, we're going to want to create a "Pitchbook Swipe File" so that we can cultivate ideas later for current or future pitchbooks we're creating. The same goes for anything you're doing on Elance, such as having a financial model built, logos, or any other creative work.

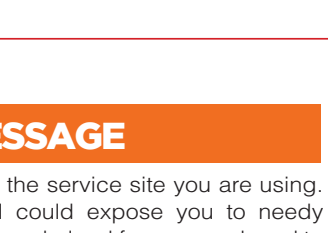
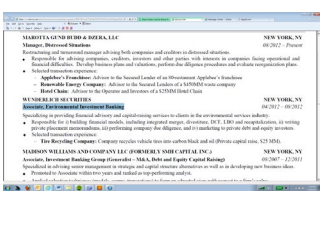
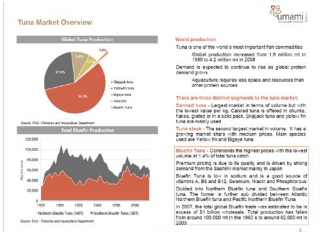
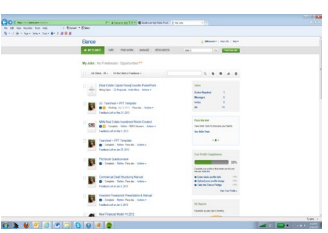
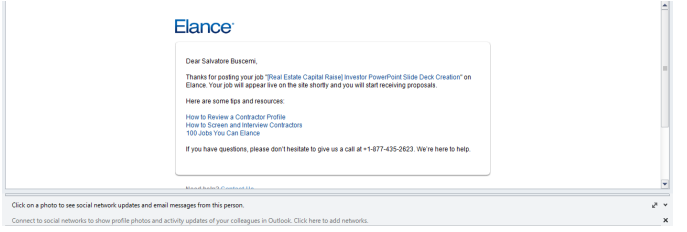
Always remember this: you're looking for a service provider who will make you look smarter than you actually are, and someone you can use again over and over again.

### STAGE 3: How To Hire

Most of these virtual assistant companies like Elance.com will require you to put your funds in their escrow. This is very easy to use and is straightforward. If there are any disputes, Elance will arbitrate.

**Set up Milestones, cut up into project "thirds":**  
- 1/3 funded at hire.  
- 1/3 funded after first complete draft  
- 1/3 funded after project completion.

**Do not under any circumstances pay for contractors outside of Elance.com.** Your money is certain to go poof without any recourse and Elance will not arbitrate on your behalf because they get 10% off the top of whatever you pay your contractor. And Elance will probably throw you off their cloud too. Govern yourself carefully and don't let someone on the other side of the country – or globe – tell you differently.

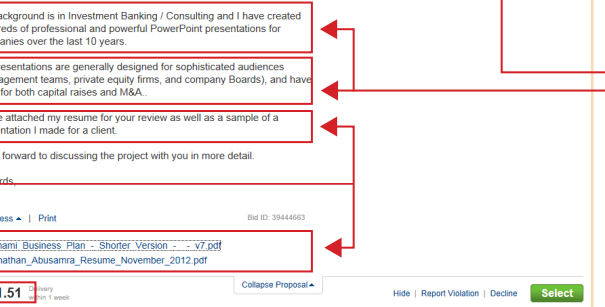
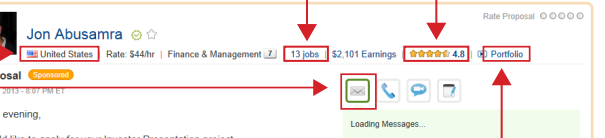
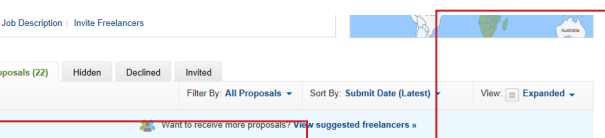


### COUNTRY

**Keep it made in the USA.** The reason: you don't want to scare your investors with terms and jargon that may come across awkward if English is not your writer's native language. Think of some directions you've read from products you've purchased overseas. The next best choice would be England. Both the US and Britain have very robust and competitive financial centers and employees often move from once office to another.

### NUMBER OF JOBS

The more experience on Elance or a similar site, the better. **Especially if this is your first job, you'll want to have some experience behind you to guide you through anything that may come up.** Choosing the right person can make a big difference from you and you can learn a lot from some of these Contractors.



### PRICE

Their price should be commensurate with their experience. As we'll look below, if this Candidate worked at a top investment bank, that may force your hand to pay a little more for that experience and vice versa. **In the end, it's your reputation on the line.**

### RESUME AND SAMPLE WORK

The reason why we want to see sample work is **because we are very, very specific of the skills that we want.** Your goal should be to have 1-3 investment bankers that you have shortlisted for your projects. The folks who have these skill sets are the most sought after. To get a job at a Wall Street Investment Bank is very competitive; you need to go to the best schools, best MBA programs and pass a rigorous training program at the firm. In down markets, usually the Analysts and Associates are the first to be laid off and do freelancing while looking for a new job. So you're essentially getting this talent available to you at a discount that would make most Black Friday shoppers jealous...

### RATINGS

**You want someone who is rated high, especially if this is your first job.** However, if they are new to Elance, they will not have "zero" Number of Jobs. Therefore, you can probably negotiate with someone for a dirt low bid if they prove to you they have the experience you're looking for. This way, you'll give them the job they need to be competitive in exchange for a low price.

### PORTFOLIO

If your Bidding Contractors didn't provide any samples of their work, you're going to want to check out their Portfolio. If they don't have a Portfolio, then move on. **HINT:** The Portfolio is a great way for you to build a pitchbook "swipe file" for you to use to cultivate ideas for your current or future projects

### KEY WORDS

Consulting is common, but not exciting enough for you. **Investment Banking is the gold you're looking for.** These guys know how to sell anything as evidenced by our example here who is raising money for a seafood sustainability company.

### PRIVATE MESSAGE

Keep it on Elance or on the service site you are using. Going outside to email could expose you to needy contractors who will beg and plead for your work and to be paid outside of Elance or your service site. Once the bid is accepted and the terms are laid out, using Skype is fine. Be sure to outline the boundaries of your relationship with your contractor. Having him or her ping you every waking hour is not productive. When the dialogue is over on Skype, "Quit Skype". Don't merely "exit". They can still see you!

