

Property Investment Partnership – Roles & Responsibilities

This document clearly defines the responsibilities of each party in the property investment process. It is designed to ensure clarity, reduce overlap, and provide confidence for all involved.

Sourcer	Builder	Investor
<ul style="list-style-type: none">• Source and negotiate the property deal.• Conduct due diligence, comparables and present ROI.• Introduce investor to solicitor, broker, builder.• Handover after deal setup	<ul style="list-style-type: none">• Approve initial deal proposal.• Attend property with sourcer to verify refurb estimate and proposed works• Prepare scope of works and budget.• Manage trades, materials, and schedule.• Provide progress reports with photos/invoices.• Deliver completed refurb to investor.	<ul style="list-style-type: none">• Pay sourcing fee• Provide agreed funds for purchase, refurb, and contingency.• Approve initial deal proposal.• Sign legal/financial agreements (go ahead with solicitors)• Receive returns and reports.



Williams Capital Properties

Building Wealth Through Property | Invest Smart

Contact us

Call us: 07940 227 046

Website: williamscapitalproperties.com

Email: info@williamscapitalproperties.com

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Property Investment Partnership – Roles & Responsibilities

To identify, secure, and present profitable property investment opportunities for the investor.

“During this stage, my role is to secure the property exclusively for you. Any forms or documentation completed are simply part of ensuring that exclusivity is in place and the process runs smoothly. Please note that no purchase is progressed, and no commitments are made, until each step is fully completed and you are comfortable to move forward.”

Sourcer (Mark Williams)

Deal Sourcing & Analysis

- Research and identify suitable properties / land that meet investor criteria.
- Conduct due diligence (comparables, ROI, rental yields, exit strategy).
- Negotiate purchase price and terms with agents/vendors.

Investor Presentation

- Package the deal clearly (figures, risks, timelines).
- Provide transparent breakdown of costs and expected returns.

Facilitation

- Manage estate agent relationship up until confirmed property purchase
- Introduction to interior design and staging
- Introduce investor to...(broker if needed for property purchase - bridging loan
- Hand over project details to project manager/builder.



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Property Investment Partnership – Roles & Responsibilities

To plan, manage, and deliver the refurbishment/construction project from start to finish, ensuring quality, budget control, and timely delivery.

Builder

Planning & Scope

- Attend property viewing to view property and confirm refurb estimate
- Cost up refurb work based on site visit
- Create detailed scope of works, timelines, and budget.
- Advise on feasibility and practical considerations

Project Management

- Coordinate and supervise all trades and subcontractors.
- Source and manage materials
- Monitor progress against schedule and budget

Reporting & Delivery

- Provide regular updates (photos, reports, cost tracking)
- Flag issues early and propose solutions
- Handover completed property to investor



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Property Investment Partnership – Roles & Responsibilities

To provide the funding for the property purchase and refurbishment while remaining largely hands-off in day-to-day operations.

Investor

Funding

- Provide agreed funds (deposit, refurb budget, fees, contingency).
- Ensure funds are available on time to avoid delays.

Decision Making

- Approve the initial deal package before purchase.
- Sign legal and financial agreements upon agreed refurb work estimate from Matt*

Documentation

- Provide necessary documents to secure property exclusivity i.e. ID, proof of residency, AML form completion when required

Returns & Oversight

- Receive agreed returns (fixed interest or profit share).
- Stay informed through periodic updates (monthly/quarterly).



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