

AI FOR REAL ESTATE INVESTORS

Your Practical Resource Guide

Presented to OKCREIA
Oklahoma City Real Estate Investors Association

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GETTING STARTED

Recommended Tools

Tool	Best For	Cost	Website
ChatGPT	All-around, images, voice	Free / \$20/mo	chat.openai.com
Claude	Deal analysis, contracts, writing	Free / \$20/mo	claude.ai
Gemini	Google Workspace (Gmail/Sheets)	Free / \$20/mo	gemini.google.com
Copilot	Microsoft 365 (Word/Excel)	Included w/ M365	copilot.microsoft.com

Recommendation: Start with the free tier of ChatGPT or Claude. For deal analysis and contract review, Claude is the workhorse. Pick one, use it for one task this week, then decide on the \$20/mo upgrade.

The Prompting Framework: R-T-C-F

R	Role	Who should the AI be? (buy-and-hold investor, wholesaler, etc.)
T	Task	What specifically do you want done?
C	Context	The deal numbers, your buy box, the market
F	Format	Show the math, a table, a verdict, word count

■ THE ONE RULE: Verify every number money rides on

AI gives you a fast first draft and the math scaffolding — but it can confidently invent an ARV, a comp, or a rent figure. Never close on an AI-generated comp or number without verifying it against current, real data. AI is a force multiplier on your judgment, not a replacement for it.

DEAL ANALYSIS & UNDERWRITING

Rental (Buy & Hold) Underwriting

Role: Act as a buy-and-hold real estate investor underwriting a rental. **Task:** Tell me if this deal meets my targets and give a pursue/pass verdict. **Context:** • Purchase price: \$[PRICE] • Estimated rent: \$[RENT]/mo • Taxes: \$[X]/mo | Insurance: \$[X]/mo • Down payment: [X]% | Interest rate: [X]% • Other costs (HOA, PM %, vacancy %, maintenance): [DETAILS] • My targets: [e.g., 8%+ cash-on-cash, \$200+/mo cash flow] **Format:** Show the math line by line (mortgage, expenses, NOI, cash flow, cash-on-cash, cap rate, 1% rule). End with a one-line verdict: PURSUE or PASS, and why.

Fix & Flip Quick Analysis

Role: Act as a fix-and-flip investor running the 70% rule. **Task:** Tell me my max allowable offer and projected profit. **Context:** • ARV (after-repair value): \$[ARV] • Estimated rehab: \$[REHAB] • Holding + selling costs: [or use 10% of ARV] • Asking price: \$[PRICE] **Format:** Show the 70% rule calc, max allowable offer, and projected profit at asking. Flag if the spread is too thin. One-line verdict.

BRRRR Scenario

Role: Act as a BRRRR investor modeling a refinance. **Task:** Show me how much capital I get back and the post-refi cash flow. **Context:** • Purchase: \$[PRICE] | Rehab: \$[REHAB] • ARV: \$[ARV] | Refi LTV: [e.g., 75%] • New rate: [X]% | Rent: \$[RENT]/mo | Taxes+Ins: \$[X]/mo **Format:** Show all-in cost, refi loan amount, cash left in the deal, and post-refi monthly cash flow + cash-on-cash. Verdict: infinite return, partial pull-out, or capital trapped.

FINDING & MARKETING TO SELLERS

Motivated Seller Letter

Role: Act as a direct-mail copywriter for real estate investors. **Task:** Write a yellow-letter style note to a motivated seller. **Context:** • Seller situation: [absentee / inherited / pre-foreclosure / tired landlord] • My offer angle: [fast cash close / as-is / flexible timeline] • Area: [NEIGHBORHOOD/ZIP] **Format:** Warm, personal, low-pressure. Under 120 words. Clear call to action with placeholder for phone number. Avoid sounding like a mass mailer.

Cold Call / Text Scripts

Role: Act as an acquisitions specialist who books appointments. **Task:** Write [5] text/cold-call openers for [absentee owners / expired listings]. **Context:** • My offer: [cash, as-is, fast close] • Tone: [friendly, respectful, not salesy] **Format:** 5 short variations under 30 words each. Each ends with a question that invites a reply. Include 2 objection-handling responses for "I'm not interested."

Summarize a Lead List

Role: Act as a data analyst for a real estate acquisitions team. **Task:** Help me prioritize this lead list. **Context:** I'll paste a list with [columns: address, owner type, equity, years owned, etc.]. **Format:** Rank the top 25 leads most likely to be motivated, with a one-line reason each. Tell me which data signals you weighted most. NOTE: De-identify / remove any sensitive personal info before pasting into a free tool.

Buyer-List Blast (Wholesaling)

Role: Act as a wholesaler marketing a deal to a cash-buyer list. **Task:** Write a deal blast email/text. **Context:** • Property: [beds/baths/sqft, area] • Numbers: ARV \$[X], rehab \$[X], asking/assignment \$[X] • Why it's a deal: [the spread, the area, the upside] **Format:** Punchy. Lead with the spread. Bullet the numbers. Urgency + clear next step to lock it up. Under 150 words.

MARKET & NEIGHBORHOOD RESEARCH

Neighborhood Snapshot

Role: Act as a local real estate analyst. **Task:** Give me an investor's snapshot of a neighborhood. **Context:** • Area: [NEIGHBORHOOD/ZIP, City] • My strategy: [buy-and-hold / flip / short-term rental] **Format:** Cover typical price range, rent range, tenant demand, and the 2-3 things an investor should watch. Flag anything I should verify with current MLS/local data (since you may not have today's numbers).

Rent Estimate Sanity Check

Role: Act as a property manager estimating market rent. **Task:** Give me a likely rent range and what drives it. **Context:** • Property: [beds/baths/sqft, condition, area] • Comparable rents I've seen: [list any you have] **Format:** A low/likely/high range with the factors that move it (condition, amenities, location). Remind me to confirm against current listings.

CONTRACTS, OFFERS & DOCUMENTS

Draft an Offer / LOI

Role: Act as a real estate investor writing a letter of intent. **Task:** Draft a clean, professional LOI. **Context:** • Property: [ADDRESS] • Offer price & terms: [PRICE, earnest money, close timeline, contingencies] • Buyer entity: [LLC NAME] **Format:** Professional, concise, fill-in-the-blank where needed. **DISCLAIMER:** Have an attorney review before sending. AI drafts are starting points, not legal advice.

Plain-English Term Sheet (Creative Finance)

Role: Act as an investor explaining a creative finance structure simply. **Task:** Draft a plain-English term sheet a seller can understand. **Context:** • Structure: [subject-to / seller finance / lease option] • Terms: [price, down, rate, monthly, balloon, term length] **Format:** Simple language, no jargon. Show the seller's monthly benefit. End with "next steps." Note that an attorney should paper the final deal.

Summarize a Long Document

Summarize this [lease / inspection report / title doc] in plain English. Pull out: key dates, dollar amounts, obligations, red flags, and anything that could cost me money. List action items at the end. [PASTE DOCUMENT]

TENANTS & PROPERTY MANAGEMENT

Tenant Screening Criteria

Role: Act as a property manager writing screening criteria. **Task:** Draft fair, consistent tenant screening standards. **Context:** • Property type & rent: [DETAILS] • My requirements: [income multiple, credit, rental history] **Format:** Clear written criteria applied equally to all applicants. **IMPORTANT:** keep it Fair Housing compliant – flag anything that could create a problem.

Maintenance / Tenant Reply

Role: Act as a professional landlord responding to a tenant. **Task:** Write a reply to this tenant message. **Context:** • Their message: [PASTE] • My position / next step: [what you'll do] **Format:** Calm, professional, documents the facts. Clear next step and timeline. Under 120 words.

Lease Clause / Addendum (draft)

Role: Act as a landlord drafting a lease addendum. **Task:** Draft a clear addendum for [pets / late fees / yard care / etc.]. **Context:** [your policy and any state/local rules you know] **Format:** Plain, enforceable language. **DISCLAIMER:** have an attorney review before use; landlord-tenant law is state-specific.

REHAB & CONTRACTORS

Scope of Work

Role: Act as a rehab project manager. **Task:** Build a scope of work for a [cosmetic / full] rehab. **Context:** • Property: [sqft, beds/baths, condition notes] • Goal: [rent-ready / retail flip] • Known issues: [list] **Format:** Room-by-room scope with line items. Add a rough budget range per category so I can sanity-check bids.

Compare Contractor Bids

Role: Act as a rehab project manager reviewing bids. **Task:** Compare these contractor bids and flag differences. **Context:** I'll paste [Bid A] and [Bid B]. **Format:** Side-by-side table by line item. Flag what's missing from each, where they differ most, and which questions to ask before signing.

QUICK-USE TEMPLATES

Copy these when you're moving fast:

Instant Deal Check

Quick analyze this rental: \$[PRICE], \$[RENT]/mo rent, \$[X]/mo taxes+ins, [X]% down at [X]%. Cash flow, cash-on-cash, cap rate, 1% rule. One-line verdict: pursue or pass.

Instant Offer Email

Write a friendly 60-word email making a cash, as-is offer of \$[PRICE] on [ADDRESS], [X]-day close. Professional, low-pressure, clear next step. Include placeholder for my phone.

Spreadsheet Formula Helper

I'm building a deal calculator in Google Sheets. Give me the exact formula to calculate [cash-on-cash return / mortgage payment / cap rate] and tell me which cells to reference.

TIME-SAVING WORKFLOWS

Triage 50 Leads: 15 minutes instead of an afternoon

1. De-identify and paste your lead list
2. Ask AI to rank the top 25 by motivation signals
3. Have it draft an outreach script for the top tier
4. You make the calls – AI did the sorting

Analyze a Deal On the Drive: 2 minutes

1. Open your AI app on your phone
2. Paste the Instant Deal Check template with the numbers
3. Get cash flow + verdict before you leave the curb
4. Verify the comps later before you offer

New Listing / Resale Copy: 10 minutes

1. Give AI the property details
2. Get MLS description + social post + buyer-blast versions
3. Review, add your photos, post

TIPS FOR SUCCESS

DO THIS	DON'T DO THIS
Verify every number money rides on	Close on an AI-generated comp or ARV
Give it your real buy box and numbers	Expect good output from vague prompts
Have an attorney review contracts	Treat AI drafts as legal/tax advice
De-identify data in free tools	Paste sensitive personal/financial info
Iterate — refine the answer	Accept the first draft as final

ADVANCED MOVES

Build Your Buy-Box Knowledge Base

Paste this at the start of any deal prompt so AI judges deals like you do:

When analyzing deals for me, know that: • My market: [CITIES/ZIPs] • My strategy: [buy-and-hold / flip / BRRRR / wholesale] • My targets: [min cash flow, min cash-on-cash, max rehab] • My financing: [typical down %, rate, lender type] • Deal-killers: [things you always pass on] Judge every deal against these and tell me pursue or pass.

Build Your Own Deal Analyzer

Like the one from the live demo — ask AI to build it, then keep it on your phone:

Build a mobile-friendly rental analyzer. Inputs: price, rent, monthly taxes, monthly insurance, down payment %, interest rate, plus optional rehab cost. Outputs: monthly cash flow, cash-on-cash, cap rate, 1% rule check, and a pursue/pass verdict. Clean, simple design I can use on my phone.

Voice-Clone Your Outreach

Here are 3 messages I've sent sellers that got responses. Study my tone and style: [PASTE]. Now write a new one for [SITUATION] in my voice.

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QuidAI - AI Business Services

Thank you for having me at OKCREIA.
Questions about putting AI to work in your investing business? Reach out anytime.

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