

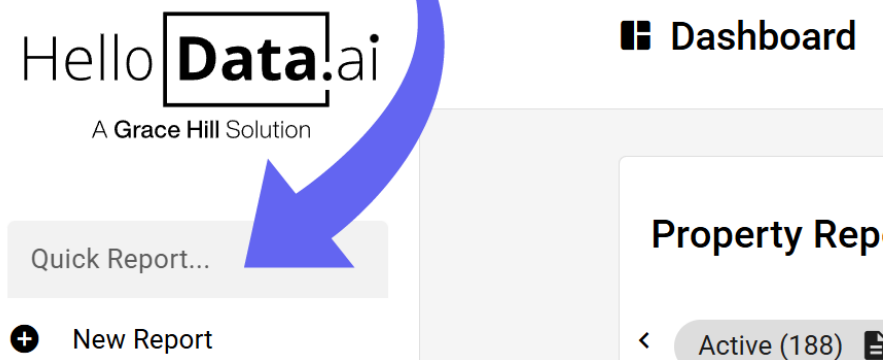
## HelloData: 3-Step Multifamily IC Memos with AI

We're about to generate a full, detailed investment committee memo for a multifamily investment property in less than 5 minutes. To kick things off, we'll need some data... start your [HelloData 7-Day Free Trial](#) so you can download everything you need.

If you're already a HelloData subscriber, just log in [here](#).

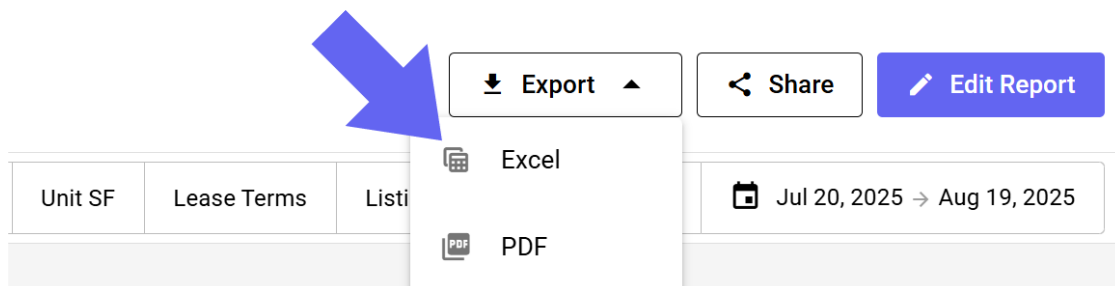
### Step 1: Search Property

Type your property name or address here and select it from the list, then click "Generate Report" in the upper right corner of the screen:



### Step 2: Export to Excel

After generating the report, click "Export" in the upper right corner and select the excel option:



Since the supporting tables and graphs you'll need for your investment committee memo are automatically generated in the export, **open it up and click "Enable Editing" in the yellow banner** to see detailed data on rent trends, and several tables comparing the subject property to its closest comps.

Note: You may also want to update the assumptions on the “Pro Forma Model” tab to match your typical hold period, value-add strategy (if applicable) and financing terms.

## Step 3: Let Chat GPT Do the Rest!

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After saving, upload the export to ChatGPT, then copy and paste in the following prompt and press enter:

### ChatGPT Prompt:

“You are an institutional real estate investment analyst preparing an investment committee memo for the potential acquisition of a large multifamily asset. I have provided an Excel file containing detailed property-level data across multiple tabs, including:

- Subject property information (unit mix, rent roll, exposure, occupancy, concessions, leasing trends, amenities, reviews).
- Comparable property data for 10 nearby assets, with more than 2 years of historical leasing performance.
- A full 10-year financial model with assumptions, rent growth, expenses, capital structure, and return metrics.

Using only the data provided in this file (and supplementing with market/submarket context via internet search as needed), write a highly detailed, professional IC memo structured as follows:

- **Executive Summary** – High-level overview of the investment opportunity, acquisition thesis, and key risks.
- **Property Overview** – Location, year built, physical description, amenities, and competitive positioning.
- **Market Overview** – Submarket demographics, demand drivers, supply pipeline, rent trends, absorption, and positioning of the asset within the competitive set.
- **Comparable Property Analysis** – Rent comparisons, historical leasing trends, occupancy, concessions, absorption, and exposure curves relative to subject property.
- **Historical Operating Performance** – Review of subject property’s rent growth, occupancy, leasing velocity, and concessions over the past 2+ years.

- **Unit Type Performance** – analysis of performance by unit type (e.g., studios vs. 1BR vs. 2BR+), including occupancy, rent growth, leasing velocity, concessions, and exposure trends. Highlight strengths and weaknesses relative to comps.
- **Financial Analysis** – Summary of pro forma assumptions, revenue growth, expenses, NOI, capitalization, debt assumptions, DSCR, LTV, and return metrics (IRR, equity multiple, cash-on-cash). Highlight sensitivities and breakeven analysis.
- **SWOT Analysis** – structured assessment of Strengths, Weaknesses, Opportunities, and Threats, explicitly referencing both:
  - Overall property positioning and market dynamics
  - Performance by unit type (e.g., stronger absorption in larger units, weaker rent growth in studios, etc.)
- **Investment Thesis** – Why this is an attractive acquisition (location, fundamentals, operational upside, rent growth potential, long-term value creation).
- **Risks and Mitigants** – Identify potential risks (market softening, supply pipeline, interest rates, lease-up risk, operational risk) and how they may be mitigated.
- **Recommendation** – Provide a concise conclusion with a clear investment recommendation.

Write in a professional, data-driven style suitable for presentation to an institutional investment committee. The memo should be comprehensive, detailed, and grounded in the numbers provided, with supplemental market commentary as needed.”

## Summary

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That’s pretty much it. Copy tables and graphs from the export as needed to supplement the IC memo and enjoy having some much-needed time back.

If you want to run through this on a demo with our sales team, [schedule a demo](#) with our team and let’s set up a time to talk!