

Advanced Real Estate Investment & Commercial Analysis

Master financial modeling, risk assessment, and portfolio management for commercial properties. For agents, investors, and finance professionals.

Business Instructor: Daniel Brooks • 5 sections • 50 lessons • 18.25h total

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About this course

Many real estate professionals excel in residential transactions but struggle with the analytical demands of income-producing properties. Commercial real estate requires skills in financial modeling, risk assessment, and strategic portfolio management that aren't covered in basic licensing courses. This gap can limit career growth and investment returns.

This course teaches you how to evaluate commercial properties using advanced metrics like IRR and DSCR, structure financing deals, manage assets, and plan exit strategies. You'll work through video lessons, case studies, and hands-on projects including deal analysis, portfolio simulation, and lease negotiation role-plays to build real-world competence.

Course curriculum

Real Estate Fundamentals & Investment Metrics

- **Understand Commercial Real Estate as an Asset Class (18m)**
Explore how commercial real estate differs from residential and its role in investment portfolios for diversification.
- **Calculate and Interpret Key Yield Metrics (22m)**
Step-by-step guide to computing Cap Rate, Cash-on-Cash Return, and Net Operating Income for deal evaluation.
- **Identify Main Commercial Property Types (15m)**
Overview of multifamily, office, retail, industrial, and alternative sectors with investment considerations.
- **Analyze Market Cycles and Economic Trends (20m)**
How economic factors affect property values and timing for real estate investments relative to current conditions.
- **Conduct Basic Property Inspections (12m)**
Key physical factors to assess when evaluating a property's condition and potential issues.
- **Gather Market Research and Data Sources (18m)**
Learn to use reliable data sources for market analysis to inform investment decisions.
- **Set Investment Goals and Criteria (15m)**
Define your strategy based on risk tolerance and return targets for commercial properties.
- **Project: Calculate Metrics for a Sample Listing (25m)**
Hands-on exercise applying Cap Rate and Cash-on-Cash Return to a real-world property listing.

Valuation, Due Diligence, and Financial Modeling

- **Build a Discounted Cash Flow Model (28m)**
Step-by-step guide to constructing a DCF analysis for estimating property value from future cash flows.
- **Use IRR and NPV for Investment Decisions (22m)**
How to calculate and interpret Internal Rate of Return and Net Present Value as decision tools.
- **Perform Comprehensive Due Diligence (30m)**
A checklist approach covering physical, financial, and legal checks to uncover risks and verify details.
- **Create a 5-Year Pro Forma Statement (35m)**
Build a pro forma projecting income and expenses for a multi-tenant property over five years.
- **Understand Replacement Cost and Depreciation (18m)**
How replacement cost and depreciation influence property assessments for valuation and tax purposes.
- **Compare Automated Valuation Models and Appraisals (15m)**
Evaluate the accuracy of AVMs versus professional appraisals in different scenarios.
- **Conduct Market Analysis with Comparables (20m)**
Techniques for finding and using comparable sales data to support property valuations.

- **Assess Risks in Property Valuation (22m)**
Identify and quantify risks like market volatility or tenant turnover that impact value.
- **Case Study: Valuing a Mixed-Use Property (25m)**
Apply valuation methods to a complex property type with multiple revenue streams.
- **Overview of Financial Modeling Software (18m)**
Introduction to tools like Excel and specialized software for real estate financial analysis.

Capital Structures & Financing Strategies

- **Explore Commercial Loan Types (22m)**
Understand conventional, bridge, and construction loans for different property stages and needs.
- **Analyze Loan Terms, DSCR, and LTV (25m)**
Key metrics lenders use to evaluate loan applications, including Debt Service Coverage Ratio.
- **Introduction to Real Estate Investment Trusts (18m)**
How REITs operate as an investment vehicle and their role in real estate portfolios.
- **Project: Model Financing Scenarios (30m)**
Compare fixed-rate, floating-rate, and bridge loans for a property and recommend the best option.
- **Leverage Debt to Amplify Returns (20m)**
How using debt can increase returns but also adds risk, with practical examples.
- **Learn About Mezzanine Financing (15m)**
Alternative capital sources like mezzanine debt and preferred equity for larger deals.
- **Understand Loan Fees and Penalties (12m)**
Explanation of origination fees, points, and prepayment penalties in commercial loans.
- **Case Study: Financing a Multifamily Acquisition (28m)**
Real-world example of securing financing for an apartment complex with multiple loan options.

Operational Strategy & Portfolio Management

- **Maximize Property Value with Asset Management (22m)**
Tactics for improving operations and boosting Net Operating Income through strategic management.
- **Navigate Commercial Lease Negotiations (25m)**
Key lease structures, negotiation points, and tenant management for favorable terms.
- **Apply Portfolio Diversification Theory (18m)**
How to build a balanced real estate portfolio across sectors and geographic markets.
- **Project: Create a Due Diligence Checklist and Memo (30m)**
Compile a comprehensive checklist and write a professional investment memo for an acquisition.
- **Budget for Capital Expenditures (20m)**
Plan and prioritize major property improvements like roof replacement or HVAC upgrades.
- **Select and Supervise Property Managers (15m)**
Criteria for choosing third-party managers and ensuring they meet performance standards.
- **Use Property Management Software (18m)**
Overview of tools for tracking occupancy, maintenance, and financials efficiently.
- **Role-Play: Lease Negotiation Exercise (25m)**
Simulate landlord-tenant negotiations on rent escalations, renewal options, and allowances.

- **Analyze Tenant Credit and Risk (20m)**
Evaluate tenants' ability to pay rent reliably through credit analysis and background checks.
- **Reduce Operational Costs Strategically (22m)**
Ways to lower expenses without sacrificing property quality or tenant satisfaction.
- **Case Study: Revitalizing an Underperforming Retail Property (28m)**
Turnaround strategies for a struggling retail asset, including tenant mix and upgrades.

Advanced Topics & Exit Strategies

- **Navigate Real Estate Taxation (25m)**
Depreciation, cost segregation studies, and opportunity zones to minimize tax liability.
- **Manage a Simulated \$10M Portfolio (45m)**
Hands-on simulation practicing portfolio management decisions across market cycles.
- **Evaluate Exit Strategies (22m)**
Analyze options like hold, sell, refinance, or 1031 exchange to optimize returns.
- **Capstone: Full Investment Analysis and Presentation (60m)**
Apply all course concepts to a commercial property case, with buy/hold/sell recommendations.
- **Execute a 1031 Like-Kind Exchange (18m)**
Detailed guide to deferring capital gains taxes through like-kind property exchanges.
- **Leverage Opportunity Zones and Tax Incentives (15m)**
How to benefit from federal and state programs for tax advantages in real estate.
- **Structure Joint Ventures and LLCs (20m)**
Legal structures for pooling resources and limiting liability in investment projects.
- **Apply Fix-and-Flip Strategies (18m)**
Short-term investment approaches for residential or small commercial properties.
- **Deep Dive into REIT Analysis (22m)**
How to evaluate and select REITs for passive income in a diversified portfolio.
- **Manage Risk with Insurance Strategies (20m)**
Protect investments with proper insurance coverage and risk mitigation plans.
- **Research Emerging Market Trends (18m)**
Identify investment opportunities in changing markets and sectors for future growth.
- **Build Professional Networks and Education (15m)**
Networking strategies and continuing education to stay updated in the real estate industry.
- **Course Summary and Certificate Details (10m)**
Review key takeaways and learn how to receive your certificate of completion.

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