7 STEP PROCESS TO SUCCESSFULLY INVEST IN PROPERTY
DISCOVERY SESSION
STRATEGY SESSION
PINNACLE PROGRAM
1
Goaling setting Financial Vision
→ Take time to design your ideal life style.
→ Find out where you want to be financially in the future.
→ Complete a well formed outcome (Goal setting work Sheet)
→ Complete a spending budget.
→ Mind Map "My Financial Goals"
2
Access your Resources
→ Find out exactly where you are financially.
→ Complete an Asset & Liability work sheet.
→ How much deposit do you have?
→ Meet with a finance broker to establish your borrowing capacity.
→ Get a copy of your credit file.
3
Strategy Development
→ Based from your current position.
→ What's your number $$? How much do you want to be worth when you retire?
→ What is your risk profile?
→ How old are you?
→ Build your team around you that are smarter than you
4
Research | Location & Asset Class
→ Market Overview
→ Property Selection Criteria
→ Build Design
→ Target tenant
→ Independent Valuation
5
Cash Flow Analysis
→ Income
→ Rental Appraisal
→ Interest rate
→ Loan amount
→ Tax benefits
→ Holding Costs
6
Settlement Post Settlement
→ Construction phase
→ Handover
→ Tenancy
→ Investor Property Management
→ Review
→ Continue savings program
7
Property Investment Review
→ Review your property on a regular basis.
→ Track the Australian property markets and local markets.
→ Review rental returns every 6 – 12 months.
→ Secure credit at the top of the market.
→ Claim all Tax benefits