

PROPERTY INVESTOR - SELF EVALUATION

Rate the answers 1 – 3. For an investor who knows a method to invest, your goal is 21 points or more.

1 = No/Don't know 2 = Sometimes / think so 3 = Yes / absolutely

1. I / we are aware of our current weekly expenditures and maintain written budget on a week to week basis.

1

2

3

2. I / We have a systematic approach to saving money not including extra mortgage re payments.

1

2

3

3. I/we are happy with my / our current rate of savings.

1

2

3

4. My / our investments are structured in the most tax-effective way.

1

2

3

5. My / our current mortgage is structured in a tax-effective way.

1

2

3

6. I / we are pleased with the performance of my / our current investments.

1

2

3

7. My / our current mortgage and / or liabilities are structured in the most cost effective way

1

2

3

8. I /we currently have a short [0 – 5 years] medium [5 -10 years] and long term [10 -15 years] financial plan in place to achieve our goals.

1

2

3

9. We know and understand a long term investment methodology to achieve and execute our long term investment strategy to build our asset base for retirement and leave a legacy.

1

2

3

My Score: _____

Score 0 – 10

WARNING: YOU ARE AT RISK OF MISSING OUT

You may not have even started the investment journey and don't know where to begin and this is costing you right now. You'd do some good with starting a spending budget and working out a savings plan. If you plan to save then you'll save to plan for the future. This is the first thing to master, banks will need a history of it when you apply for finance [If you're lacking some savings]. There may be some savings you can receive that you're not already. There has ever been a better time to invest into property with the current cash rate at historically low. We look back 10 years from now and say look at the golden times we had through real estate through that period that out striped all previous records!

Score 10 – 21

WITHOUT A STRATEGY IT'S A BIT OF HIT AND MISS'

You may have some runs on the board but things may feel a bit disorganised. You may not be sure if you're claiming all the correct tax benefits, and it may have been a while since you've looked at the interest rates on loans, let alone the cash flow on a property. The last valuation could have been some time ago and it may be a bit unclear what the value is and what the next steps. You may have had a plan years ago or never had a plan. You may be feeling like you should investigate it more but life gets in the road. Sometimes when people mention property it makes you feel edgy like there is more you could be doing but it's hard to know what to do first.

Score 21 – 27

WELL DONE! YOUR WELL ON YOUR WAY TO SECURING YOUR FUTURE'

You have good control over your current assets. Managing your investment property[s] feels easier, you are organised and are moving towards and more importantly know what your next goals are. Your vision gets bigger you start to get confidence to achieve your life's ambition, dreams, desires, and ideal life style.

Need some help?

Our goal is to help you turn your disposable income into the kind of financial independence that your parents and your grandparents will want to brag about.

We do this through our client "Pinnacle Program" which offers a complete support system through the entire investment process, including;

A seven-step education process as described in this document (including a Discovery and Strategy session) in a time effective manner (over 2 – 4 weeks) that reduces any fears or misconceptions and carefully matches our clients with the ideal property, providing the knowledge and confidence to grow their financial and personal wealth.

We help our clients get started with a savings plan and how to recognise good property investments. It's an easy, enjoyable process that expands your thinking. We've invested the time in getting this process right, so you don't have to spend time trying to figure it out all by yourselves.

Book in to the Discovery Session by completing the registration form at capitalproperties.com.au > Learn & Grow > Free Discovery Session



Join in the conversations on our Facebook page: Go to facebook.com/CapitalPropertiesHQ.

Thank you for using this Self Evaluation tool and taking a valuable step towards achieving your goals. If you have any further questions and you would like to get in touch :

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