

# Initial Contact



Property Advisor  Referrer  Date

## Contact Details 1

First Name  Surname

Phone/mobile  Email

Annual Income  PAYG  Self Employed

Age  Health Status  Dependents/Ages

## Contact Details 2

First Name  Surname

Phone/Mobile  Email

Annual Income  PAYG  Self Employed

Age  Health Status  Dependents/Ages

## Property Assets and Liabilities

	Home Address	Rental/Week	Est Value	Loan Balance	Fixed/Variable
	<input type="text"/>		\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
1	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
2	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
3	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
4	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>

## Other Liabilities

Credit/Store Cards	Limit	Balance Owing
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Other Loans	Repayment	Balance Owing
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

## Other Assets

Savings/offset account	ASX Shares
\$ <input type="text"/>	\$ <input type="text"/>
Superannuation 1	Superannuation 2
\$ <input type="text"/>	\$ <input type="text"/>
Other 1	Other 2
\$ <input type="text"/>	\$ <input type="text"/>

## Property Financial Objective / Comments

# Property Risk Fact Find

## Which of the following best describes your purpose for investing?

Investor 1    Investor 2

You have surplus funds to invest and you are aiming to accumulate wealth

 

You have a lump sum and you wish to invest it in property

 

You have an SMSF and wish to invest in property

 

You have a specific objective you wish to create additional funds for

 

You want a regular income stream from property investment

 

## Comments

## What is your stage of life?

Investor 1    Investor 2

A single person or couple without children

 

A single person or couple with young children

 

A single person or couple with a mature family

 

A single person or couple preparing for retirement

 

A retired person or couple

 

## How familiar are you with the Residential Property Markets?

Investor 1    Investor 2

Very little understanding or interest

 

Understand that property market have many variables but are not familiar with them

 

Understand the basics of investment property principals but unsure the best way forward

 

Experienced Investor and understand the various factors that influence performance

# Property Risk Fact Find

## Which of the following best describes your purpose for investing?

		Investor 1	Investor 2
<b>Cautious</b>	Cautious - When you hear the term RISK you think it means "danger". When you make a financial decision you focus on the possible losses rather than the possible benefits.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Conservative</b>	Conservative - You have a general understanding of investment property markets, but would like to have a broader understanding in order to explore the possibilities. You are prepared to accept moderate level of risk to achieve possible gains.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Balanced</b>	Balanced - You have a reasonable understanding of the property investment market. When you think in terms of risk you think in terms of possibilities. You are a moderate risk taker and can accept some moderate levels of investment risk.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Assertive</b>	Assertive - You are a growth investor and are seeking capital growth. You are prepared to accept higher volatility and moderate risk to achieve your goals.	<input type="checkbox"/>	<input type="checkbox"/>
<b>Aggressive</b>	Aggressive - You are a high growth investor prepared to compromise portfolio balance to pursue potentially greater longer term returns. Security of capital is secondary to the potential for wealth creation.	<input type="checkbox"/>	<input type="checkbox"/>

## Comments

## If your property was not growing in value how long until you would sell it?

Investor 1	At any loss	<input type="checkbox"/>	6 Months	<input type="checkbox"/>	12 Months	<input type="checkbox"/>	2 years	<input type="checkbox"/>	2 years+	<input type="checkbox"/>
Investor 2	At any loss	<input type="checkbox"/>	6 Months	<input type="checkbox"/>	12 Months	<input type="checkbox"/>	2 years	<input type="checkbox"/>	2 years+	<input type="checkbox"/>

## What is your anticipated capital growth over 10 years per annum?

Investor 1	0-3%	<input type="checkbox"/>	3-5%	<input type="checkbox"/>	5-7%	<input type="checkbox"/>	7-10%	<input type="checkbox"/>	10+%	<input type="checkbox"/>
Investor 2	0-3%	<input type="checkbox"/>	3-5%	<input type="checkbox"/>	5-7%	<input type="checkbox"/>	7-10%	<input type="checkbox"/>	10+%	<input type="checkbox"/>

# Property Risk Fact Find

How important are taxation benefits to you?

Investor 1	Unconcerned	<input type="checkbox"/>	Useful	<input type="checkbox"/>	Very	<input type="checkbox"/>	Extremely	<input type="checkbox"/>
Investor 2	Unconcerned	<input type="checkbox"/>	Useful	<input type="checkbox"/>	Very	<input type="checkbox"/>	Extremely	<input type="checkbox"/>

How long are you willing to invest to achieve your goal?

Investor 1	5 years	<input type="checkbox"/>	10 years	<input type="checkbox"/>	15 years	<input type="checkbox"/>	20 years	<input type="checkbox"/>	25 years	<input type="checkbox"/>
Investor 2	5 years	<input type="checkbox"/>	10 years	<input type="checkbox"/>	15 years	<input type="checkbox"/>	20 years	<input type="checkbox"/>	25 years	<input type="checkbox"/>

If your property investment is translated into retirement income what would it be per week?

\$1000

\$1500

\$2000

\$2000+

Other

Comments