

[FEE MENU]

Home Purchase Coach

For 1st Home Buyers or those upgrading their house

Approximately 2 hours of your time.

What does this involve?

- :: Creating and implementing Personal Cashflow budget. What does your lifestyle cost and how will this affect the home you want to buy?
- :: Working out your optimum loan structure to achieve your short and medium term plans and goals
- :: Surveying your options with Lenders (there is more to it than the lowest interest rate)
- :: A thorough Risk Appraisal to insure you and your loved ones
- :: Coaching you through the Purchase and Negotiation Process. This can be a daunting prospect if you haven't done it before or for a while, we will remove as much of the stress as possible

What do you get?

- :: An interactive and easy to manipulate excel spreadsheet
- :: Resource materials to reinforce and remind you of what we discussed
- :: Pre-approval from a Lender (subject to credit criteria)
- :: Ongoing access through the purchase process 7 days a week (during reasonable hours)

What will it cost you?

\$295.00

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Investment Property Coach

For 1st time Investors or Investors wanting to expand their portfolio

Approximately 2 hours of your time plus report presentation and review meeting.

What does this involve?

- :: Discussing and analysing your long term goals as they relate to Wealth Creation and Retirement
- :: Assisting you to create a Property Investment strategy
- :: Assisting you to create a plan to implement your Property Investment strategy
- :: Discussing tax implications and their future effects
- :: Discussing your options for Property Ownership Vehicles and protecting your future wealth
- :: Creating and implementing a Personal Cashflow budget. What does your lifestyle cost and how will this affect the home you want to buy?
- :: Working out your optimum loan structure to achieve your short and medium term plans and goals
- :: Surveying your options with lenders (there is more to it than the lowest interest rate)
- :: Liaising directly with your professional advisors in order to set up Companies, Trusts etc
- :: A thorough Risk Appraisal to insure you and your loved ones
- :: Coaching you through the purchase and negotiation process

What do you get?

- :: Your own property investment business plan
- :: Excel spreadsheets to provide you with medium term forecasts for your portfolio
- :: Resource materials to reinforce and remind you of what we discussed
- :: Pre-approval from a Lender (subject to credit criteria)
- :: Ongoing access through the purchase process 7 days a week (during reasonable hours)

What will it cost you?

\$995.00

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Hourly Rate

For advice on:

- :: Your personal financial management
- :: Your Loan structure and interest rate options
- :: Reviewing your lender
- :: Re-fixing and/or re-structuring your debt
- :: Your Investment Property portfolio strategy

What will it cost you ?

\$175.00 per hour

Please note that this rate applies to meetings and any work required as a result. A breakdown of time and work completed will be supplied on the invoice.