

WORKBOOK



# PROPERTY INVESTMENT SUCCESS

SESSION 1

  
BILLION DOLLAR  
BROKER

ACCELERATOR





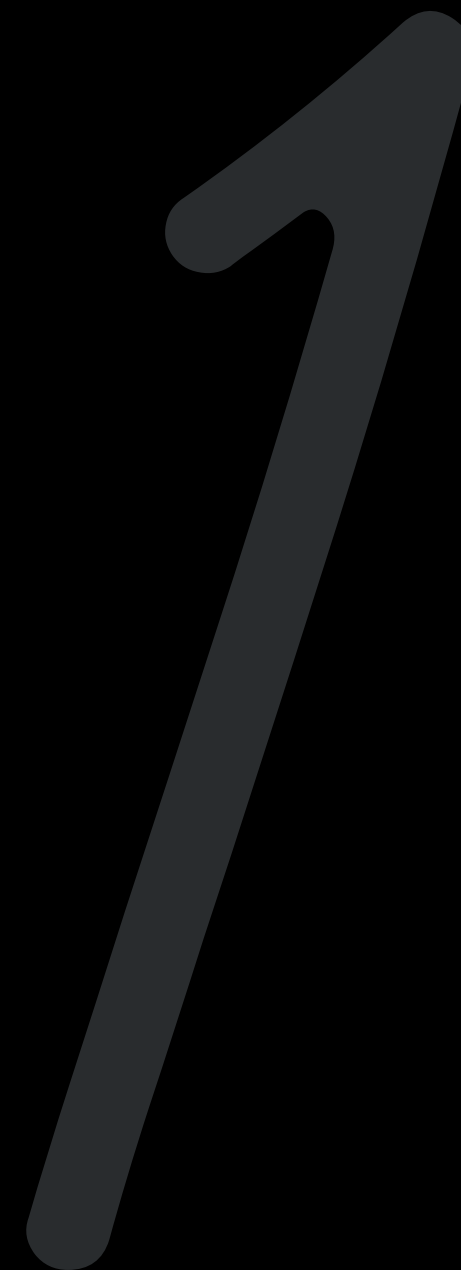


# Welcome to Property Investment Success

- Client Education
- Goals
- Strategy and Solution
- Right Team
- Acquisition

*Segment 1*

# RECAP OF ACTIONS





**How did we go with  
last week's actions?**



*Segment 2*

# INTRODUCTION





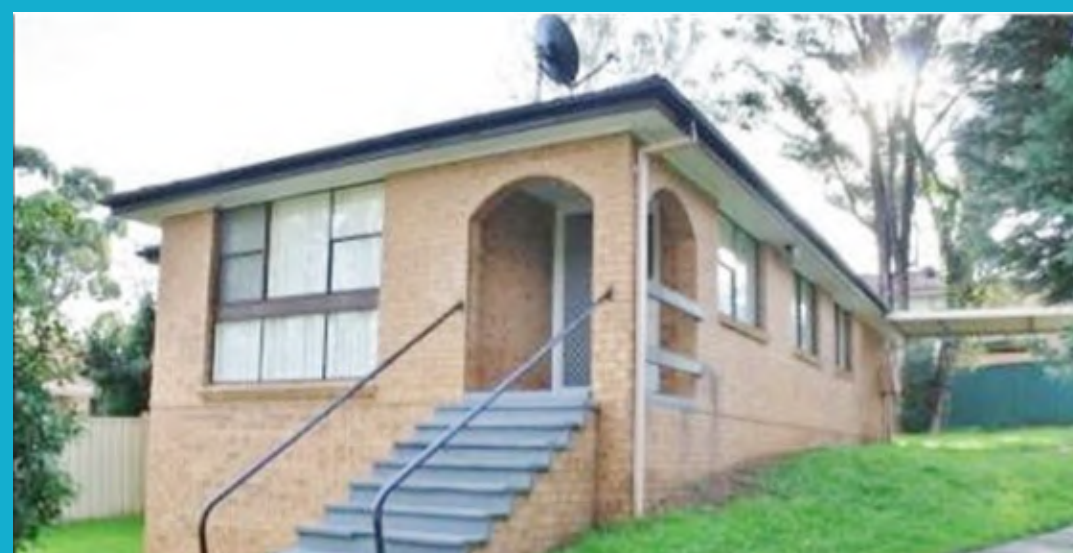
# NOTES





# MY PROPERTY INVESTMENT JOURNEY

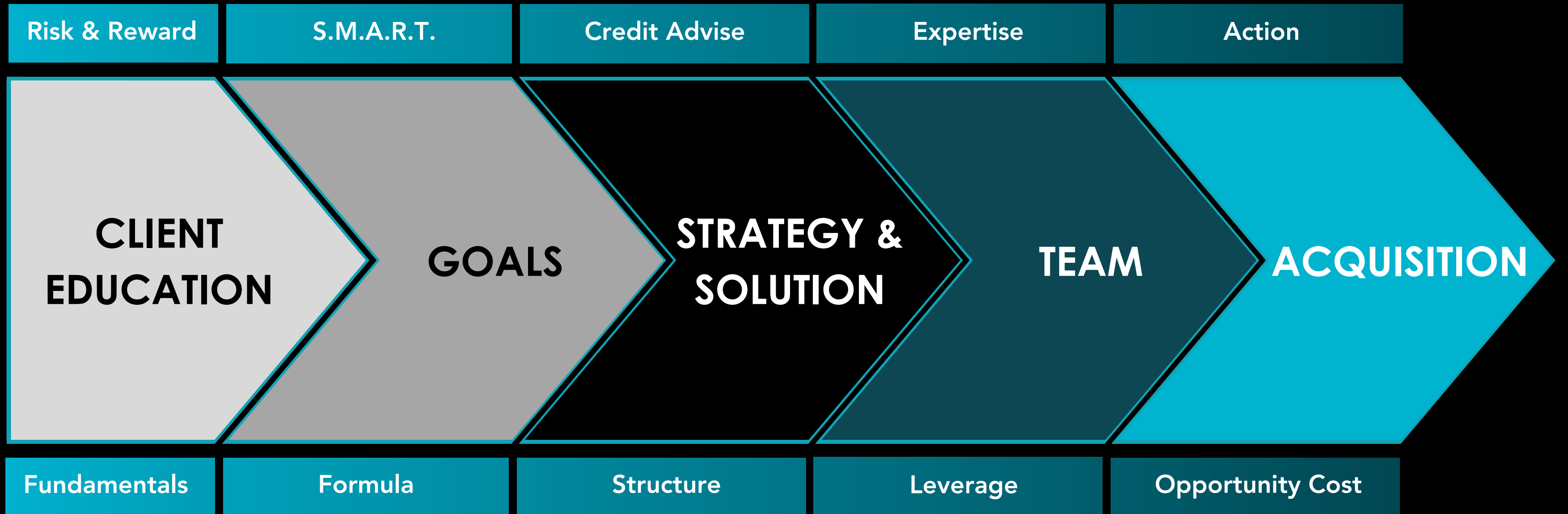
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*Broker*





# Property Investor Pathway

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*Broker*



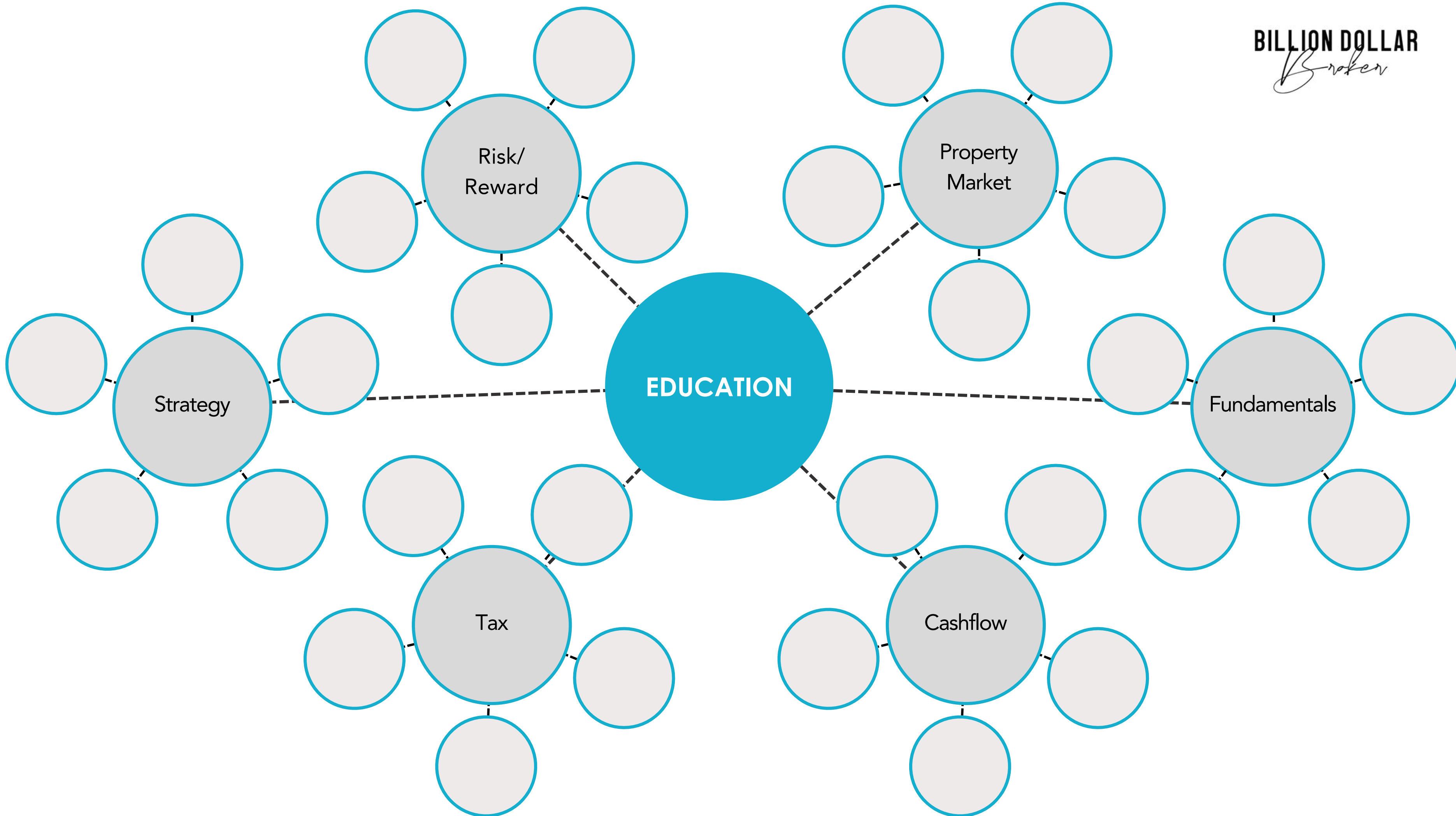


*Segment 3*

# CLIENT EDUCATION









# Power of Leverage

\*\* Example only to demonstrate the Power of Leverage

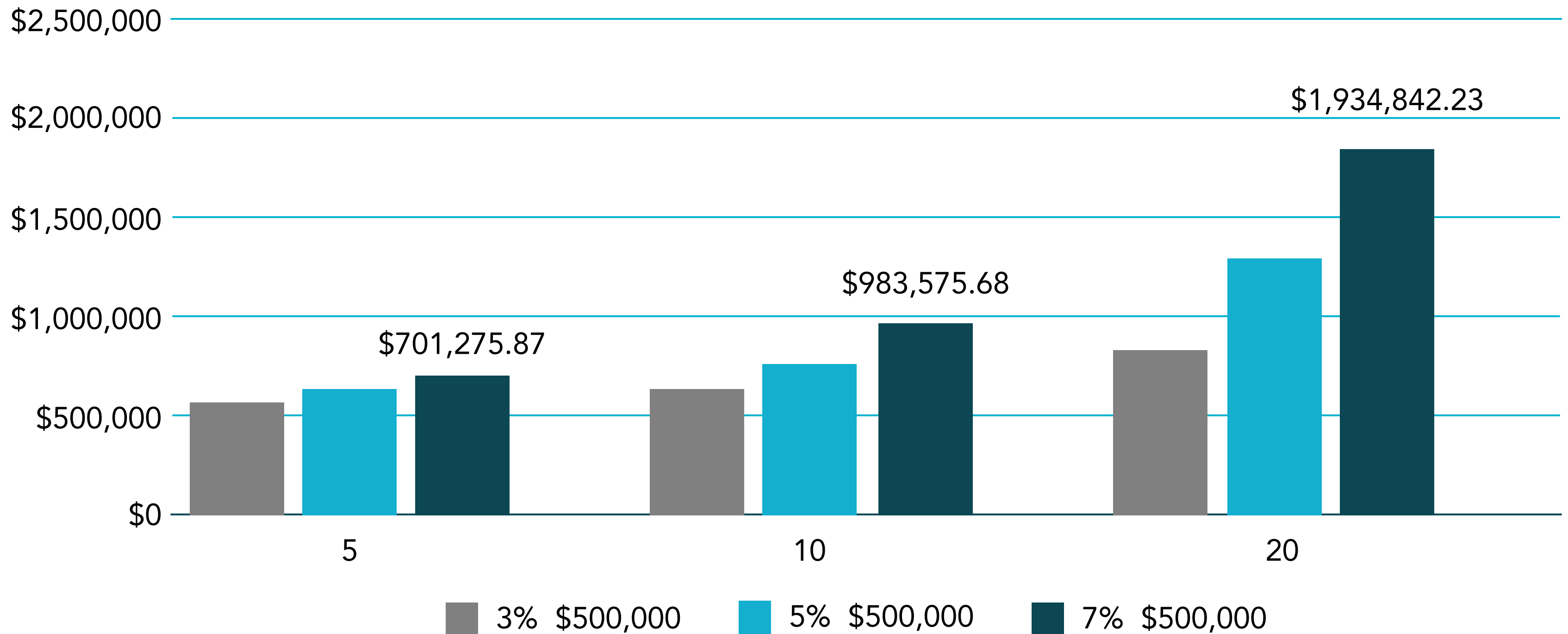
EXAMPLE	INVESTMENT no. 1	INVESTMENT no. 2
Capital Gain	8%	6%
Yield	4%	4%
Return	12%	10%
Cash Invested	\$100,000	\$100,000
Leverage	0%	80%
Could Buy in Value	\$100,000	\$500,000
Debt	\$0.00	\$400,000
Return On Investment (ROI)	\$12,000	\$50,000
Interest Costs (5%)	\$0	\$20,000
Net Return (\$)	\$12,000	\$30,000
Cash Return (%)	12.00%	30.00%



Even with a \$500K Budget, Property Investing is powerful and offers solid long term returns for our clients

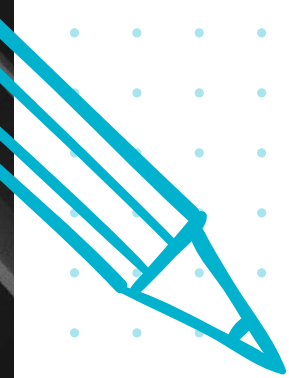
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## Capital Growth Over Time





# NOTES



*Segment 4*

**GOALS**





# Investment Property Formula

Passive Income / 5% = Assets Required



*Segment 5*

**STRATEGY &  
SOLUTION**



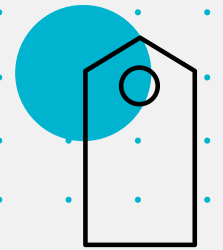


# Qualification Quadrant

Available Equity/Deposit



Equity Max Purchase Price



Equity Qualification

Rental Return



Qualify



Serviceability Qualification

# Qualification Quadrant

BILLION DOLLAR  
*Broker*

1

Work out  
available equity  
and cash for  
deposit

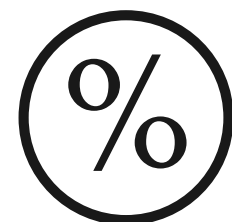
80% LVR minus  
debt plus any cash  
they are happy to  
use



2

Work out  
LVR

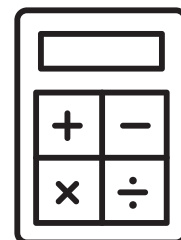
Eg for 80% LVR -  
20% deposit plus  
5% = 25%



3

Calculate  
maximum  
deposit based  
on equity

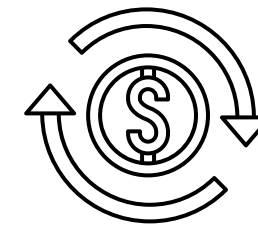
Eg \$200,000  
divided by 25% =  
\$800,000 max  
purchase price



4

Work out  
annual rental  
return

Eg 80% \$800,000  
time 4% = \$32,000



5

Do  
Serviceability





**FUTURE GOALS**

**CREDIT POLICY**

**SERVICEABILITY**

**STRUCTURE**

**PRODUCT  
SELECTION**

**\$**

**DEBT RECYCLING**

**BILLION DOLLAR**  
*Broker*

NOTES



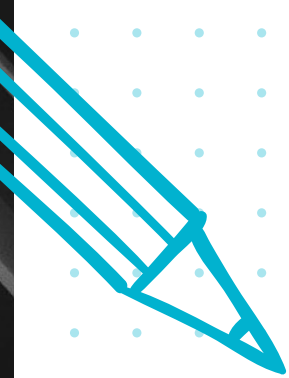


*Segment 6*

**TEAM**



# NOTES



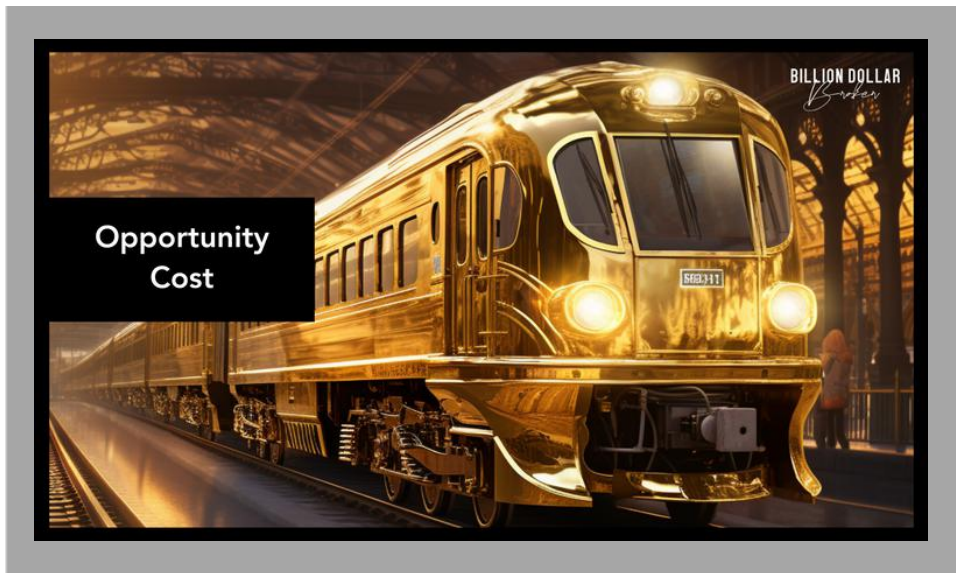


*Segment 7*

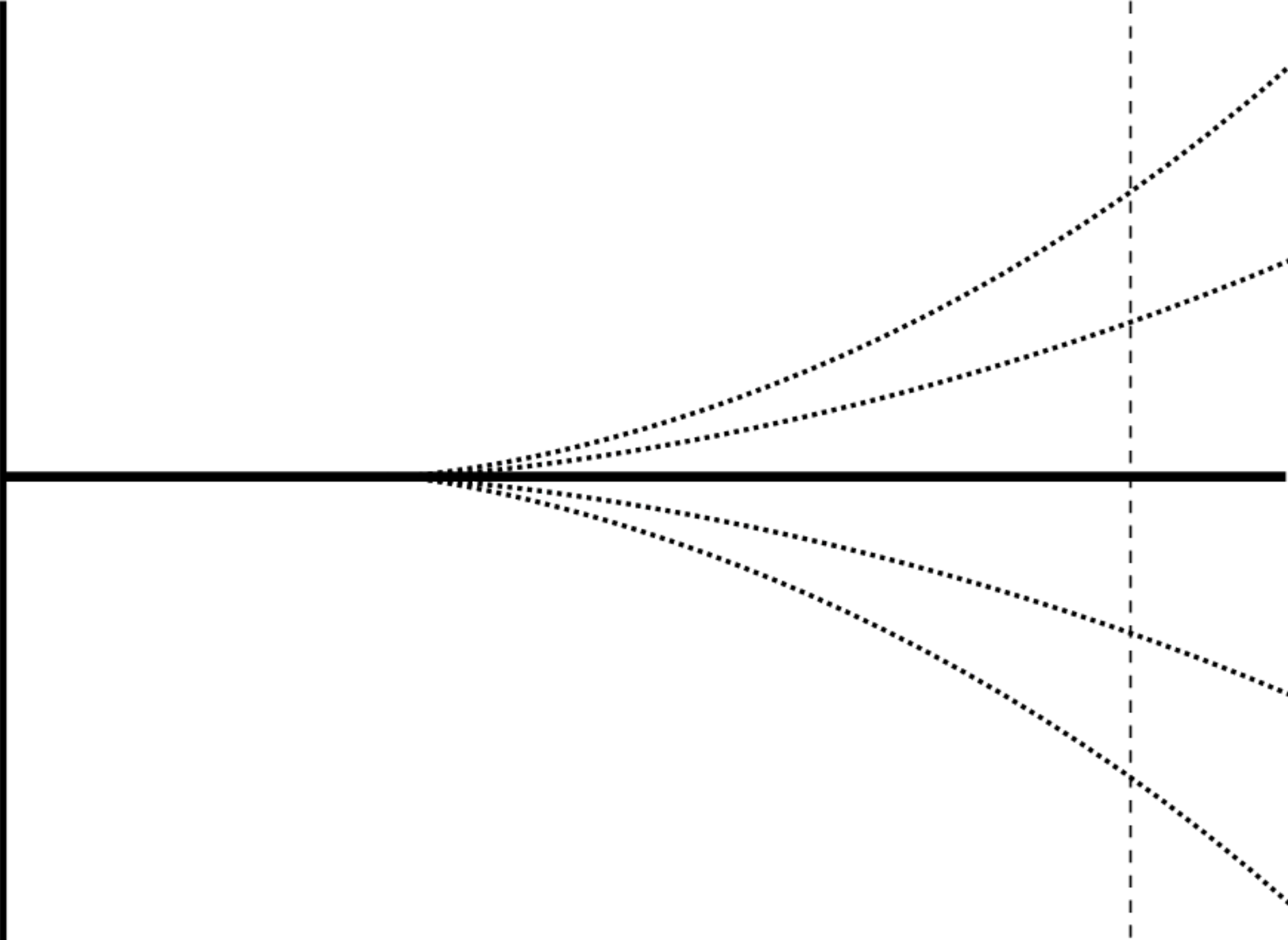
# ACQUISITION



# NOTES



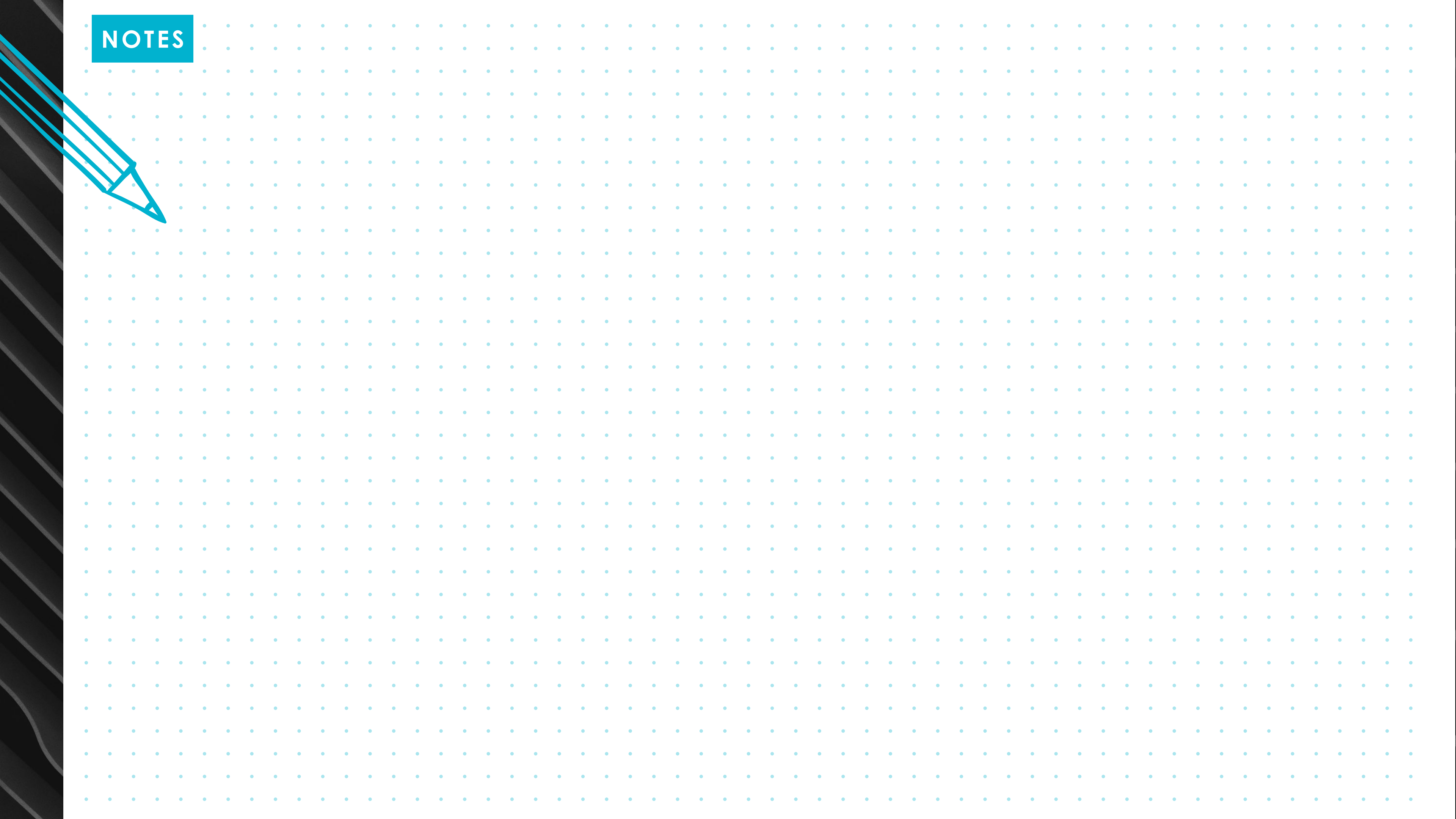
# Futures Model



**BILLION DOLLAR**  
*Broker*



NOTES



NOTES



*Segment 7*

**RECAP AND  
ACTIONS**







# Actions

for the week

Discuss the clients goals in the following way:

- Clarifying net asset position
- Qualify maximum borrowing amount
- Create strategy
- Present Futures Model

**BILLION DOLLAR**

*Broken*