

The purpose of this questionnaire is to help us find out more about where you're at, what you're looking for and what steps you might need to take to move forward with property investment.

# THE SUCCESSFUL INVESTOR YOUR PATH TO SUCCESS



## Discovery Questionnaire

Date:
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Client 1 Information				
Title:	Full Name:			
Address:				
			State	Postcode
Preferred Name:				
DOB:	Day	Month	Year	
Email:				
Phone :	H:	W:	M:	
Children under 18				
Occupation:	Self-employed	or	Employed	What is your Occupation?:
	Part time	or	Full time	Annual Taxable Income: \$

Client 2 Information				
Title:	Full Name:			
Address:				
			State	Postcode
Preferred Name:				
Relationship to Client 1	Married	De facto	Other:	
DOB:	Day	Month	Year	
Email:				
Phone :	H:	W:	M:	
Children under 18				
Occupation:	Self-employed	or	Employed	What is your Occupation?:
	Part time	or	Full time	Annual Taxable Income: \$

How did you hear about The Successful Investor?		
I would like The Successful Investor to email me information on properties and items of interest	Yes	No



Your Home	
Current value	\$
Current mortgage	\$
Minimum monthly mortgage repayment	\$
Total monthly mortgage repayment	\$
Mortgage interest rate	%

Investment Properties	State	Current Value	Current Mortgage
Investment Property 1:		\$	\$
Investment Property 2:		\$	\$
Investment Property 3:		\$	\$
Investment Property 4:		\$	\$
Investment Property 5:		\$	\$

1. Do you have any cash available that you think may assist you in buying an investment property? Yes                      No
2. People invest in property for many reasons. What is the main reason you are looking to invest these funds?
3. Which of the below strategies appeals to you most? (tick all relevant options) Buy and Renovate              Buy and Hold              Buy and Subdivide              Buy land and Develop
4. Have you owned any investment properties in the past?
5. What has been the major obstacle preventing you from purchasing an investment property to date?
6. What kind of property are you looking to purchase? (tick all relevant options) Apartments              House and Land Package              Townhouse              Off the plan              Complete
7. Do you have any specific locations in mind for your investment property? (please tick all relevant) Any state              VIC              QLD              SA              WA              NSW ACT              NT              TAS              Regional              Metropolitan              Don't Care
8. When are you looking to purchase an investment property? Now                      3 months                      6 months                      12 months
9. What is your preferred price range for an investment property? Below \$300k              \$300k - \$400k              \$400k - \$500k              \$500k +



11. Would you like some information on the following property investing concepts? (please tick relevant)

How do you use equity in your home to buy an investment property

Depreciation

Controlling your conditions when dealing with a Real Estate Agent

Valuations and making an offer subject to valuation

Building conditions

Pest conditions

Making your offer subject

What capital growth can you expect with an investment property

What questions you should ask when researching a potential investment property

12. Would you like to speak to a SMSF specialist to find out if purchasing an investment property via superannuation is suitable for you?

Yes

No

@

#

#

Please list any questions you would like answered and make any relevant comments that will assist us at your appointment.

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**Your privacy:**

Throughout your experience with The Successful Investor, it is necessary that we collect certain personal information from you so that we are able to offer you our full range of services. When we collect your personal information it is important to us that you, as a client, remain confident that we treat your information with the highest degree of privacy. For us to continue to provide the highest levels of customer service, we will ensure that your personal information is used appropriately and is not used or passed on without your permission. Protection of your personal information is a priority at The Successful Investor and as such we will take all reasonable precautions to safeguard such personal information from loss, misuse, unauthorised access, modification or disclosure.

I have read and agree to the terms and conditions outlined in the TSI Disclaimer and Privacy Policy

