

Financial self-assessment tool

Are you ready to invest in property?



Instructions

Go through the questions below and tick the options that best suit your circumstances. Once you have completed all the questions, go to the 'self-assessment clarifier' over the page and follow the instructions there to find out if you are ready to invest in property.

QUESTION 1 - What are yours and your partner's annual income levels?

- A - Combined or single income lower than \$50,000
- B - Combined or single income between \$50,000 and \$120,000
- C - Combined or single income between \$120,000 and beyond

QUESTION 2 - Do you have equity in other properties?

- A - \$0 to \$80,000
- B - Between \$80,000 and \$200,000
- C - More than \$200,000

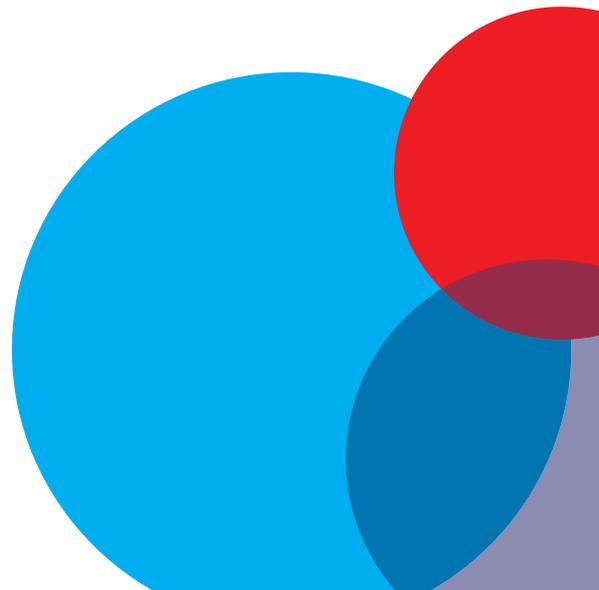
QUESTION 3 - How much savings do you have?

- A - \$0 to \$50,000
- B - Between \$50,000 and \$80,000
- C - More than \$80,000

QUESTION 4 - How much can you allocate to investing per week?

- A - \$0 to \$50
- B - Between \$50 and \$250
- C - More than \$250

GO TO THE NEXT PAGE TO WORK OUT YOUR SCORE...





Self-assessment clarifier

Add up all the B and C's that you have ticked.

Multiply your 'B total' x 1 and your 'C total' x 2 and add them together.

SCORE BETWEEN 0-2

You are not currently in a financial position to invest, however it is always a good time to get a plan set up. We can offer you a free financial plan with goals and milestones to get you ready to invest. Please call us and quote the code BeReady2015 for your free plan.

SCORE BETWEEN 2-4

You are in a fairly good position to invest in property. Contact me for some specific advise on how you might be able to invest or what to do to achieve this

SCORE BETWEEN 4-8

You are definitely able to invest in property and should call for some options and a plan.

WOULD YOU LIKE US TO CONTACT YOU?

Name:

Phone:

Email:

Score:

SUBMIT

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