



The PropertyPreneur Checklist

Score yourself 1 point for each question you can confidently answer:

- I have a clear and written investment property strategy for the next five years
- My investment property/ies are performing how I expected them to
- I have a trusted team of professionals that support my success (think Buyers Agent, Mortgage Broker, Accountant, Financial Planner, Property Manager, Insurance Broker)
- I complete an Annual Review on my property portfolio with my team of Professionals
- My will has been updated to include my investment properties
- I have access to property investors who have a portfolio I wish to achieve
- I have a designated bank account for each investment property to receive rental income, make mortgage repayments and track expenses
- I know how to calculate the cash flow position for my investment property/ies
- I use tax withholding variations to pro-actively keep on top of my tax obligations?
- I regularly review my investment loans and insurances to ensure they are competitively priced

TOTAL

How did you go? Rate yourself:

0 - 3 points

Go directly to Jail. Do not pass Go. Do not collect \$200! Let's talk about your game plan and see where you can improve your investment property portfolio.

4 - 7 points

Think of this like your school report which said "has potential but needs to apply him/herself to achieve their full potential"! We can help you get the right team surrounding you to support your portfolio and help you thrive as an Investor.

8 - 10 points

You must have played Monopoly as a child! You are doing great and have the potential to become a professional investor. Let's talk!

Need help?

Call Atelier Wealth on **1300 394 055** or email us at hello@atelierwealth.com.au