



DREAMVEST PROPERTY

Client Investment Briefing Checklist

Essential questions to align your investment strategy with your financial goals

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Your Investment Budget

- What is your absolute maximum purchase price for the ideal property?
- What purchase price would you feel most comfortable with?
- How much can you comfortably contribute to this property each week?
- Any upcoming life changes that may affect your weekly contribution?
- What is your current annual household income?
- What is your anticipated loan amount and current interest rate?

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Your Risk Profile

- How experienced and comfortable are you with property investing?
- Is this your first investment property purchase?
- Do you tend to become emotionally attached to investment decisions?
- Are you open to investing interstate if the numbers stack up better?

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Your Investment Strategy

- Buy & Hold – Low risk, hands-off, ideal for first-time investors
- Subdivide / Develop – Higher risk, requires more time and expertise
- Renovate for Value – Moderate risk, add rooms or refresh for equity uplift
- Flip / Trade – High risk, needs solid feasibility, capital and experience
- Cash Flow Positive – Great for offsetting negatively geared holdings
- High Capital Growth – Short-term focus, requires market timing skill
- Short-Term Equity Gain – Ideal for drawing equity to reinvest quickly



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Location Preferences

- Are you comfortable with both metro and regional markets?
- Do you have a preferred state or territory to invest in?
- Inner-city proximity, or are outer suburbs acceptable?

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Property Type Preferences

- House, townhouse, or unit / apartment?
- Minimum number of bedrooms required?
- Minimum number of bathrooms required?
- Preferred land size or lot dimensions?
- Any preferred building materials or construction types?

ADVISOR NOTES & MARKET INSIGHTS

- Client preferences matter, but budget ultimately drives location and property type. Set clear expectations early – never over-promise on returns or outcomes.
- Metro markets have historically delivered steadier growth with lower volatility, though regional centres are gaining strong momentum post-2020.
- 4-bedroom / 2-bathroom and 3-bedroom / 2-bathroom homes remain the most liquid and tenant-friendly formats across Australian markets.
- Houses continue to outperform units in capital growth, though apartments are closing the gap in densifying inner-city corridors due to affordability pressures.
- Low-maintenance outdoor spaces are preferable for rental appeal – unless the strategy involves subdivision or development potential.