



PORTFOLIO
PROPERTY
INVESTMENTS

—empowering you to **achieve**—

OUR VALUES

RELATIONSHIPS are the foundation to everything we do. Creating valued, long term relationships with our clients, staff and business partners will take precedence over any other activity.

EDUCATION is the key to empowering people to achieve. This counts for property investing too. With the right education we believe that people can aim and achieve higher.

EXCELLENCE is paramount to achieving great results. Everything we do and empower our clients to do is to surpass ordinary standards in order to get a better result.

INTEGRITY should show through everything we do. Only then can we provide property investors with a truly exceptional result for the advancement of their wealth.

TRANSPARENCY is the key to trust. Founded with the right relationships, we commit to being open and honest to our clients. As any business, we charge for our services. We don't see any problem with this, as long as our clients know how much and how.

EMPOWERMENT can change the lives of individuals and communities. We believe that by not just 'doing' but 'showing', we can be a part of long term solutions aiding in the advancement of both individuals and communities financial lives.

INNOVATION is at the forefront of creating a different result than what is normal. As the Australian property market landscapes change, so must the way we invest in property in order to achieve our goals. To help our clients innovate, we too innovate as a business committed to helping our clients invest in property.

TEAMWORK will allow everyone to achieve. No great man or accomplishment was ever successful on their own. Everything we do is based on the skills, knowledge, support, actions and innovation of our staff and clients. Through teamwork we can help each other create the results we want.

PEOPLE are the foundation of our success. We value our staff, stakeholders, business alliances and most importantly, our clients. Without all of those people we would not be able to succeed. By putting our clients first, we believe that our business will prosper for generations to come.

OUR VISION

Portfolio Property Investments strive to be the largest, most trusted network of property investors and affiliates in Australia while remaining a client centric organisation.

OUR MISSION

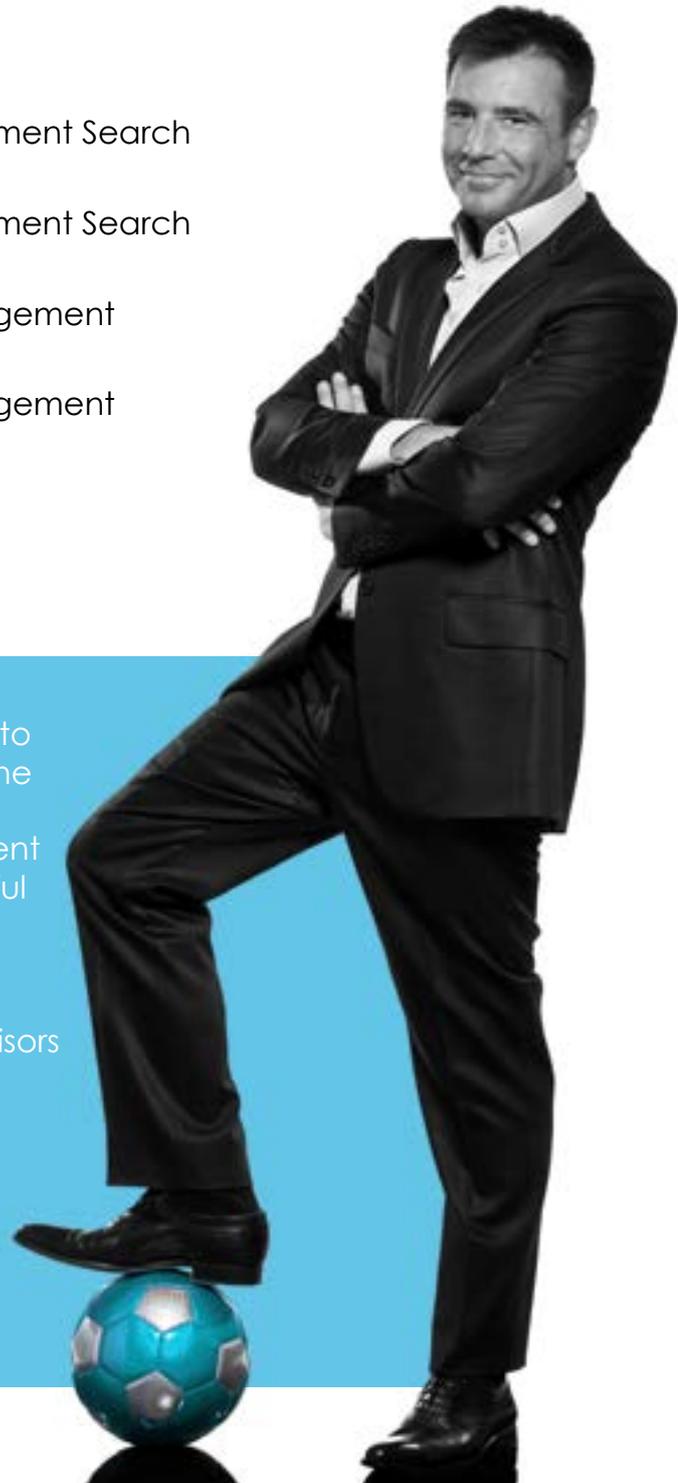
Portfolio Property Investments strive to empower each and every one of our clients to achieve their goals through property investing. To do this we believe that education, teamwork and action is paramount, thus making property investing profitable and easy for every person.

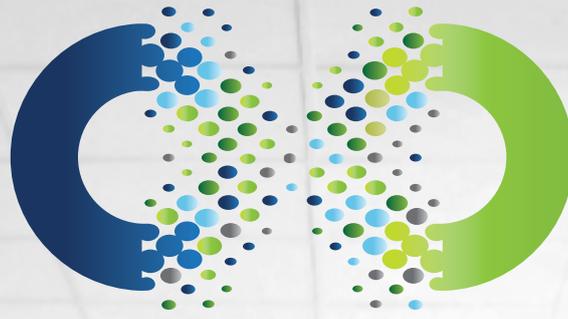
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Portfolio Property Investments is committed to providing property investing clients across the country with the most professional and personalised support and property investment advice to see our clients build truly successful property investment portfolios.

Our team of professional coaches and advisors have decades of experience within the Australian property investing marketplace. We don't believe that 'one size fits all' or that our clients should follow the success of any one person. That's why we focus on coaching you, to achieve what you want, the way you want it.





PORTFOLIO FINANCIAL SERVICES

Core to successfully executing strategic property investment advice received, is the importance of leverage. The structure of your finances and loans are the most vital ingredients when it comes to residential property investing. Finance is a crucial element for success and can make all the difference in the amount of equity, net returns, and positive cash flow a property provides.

To this end PPI's expert property investment coaches and consultants will work with you on getting your financial structures aligned with your strategy to maximise your financial situation and long term returns. Taking into account your personal financial situation, desired goals and chosen strategy, your personal property investment consultant will work with

you to make the most of what you have now, position you better for the future and assist in arranging the best possible finance and structure available.

Portfolio Financial Services provides a streamline process for you to arm you with the right mortgage options to suit your needs.

Working with your property investment consultant and our leading mortgage and finance experts, you won't just be able to secure a loan that enables you to leverage more investment properties, but set up the best entity and structure to maximise borrowing potential, protect your portfolio and minimise tax liability to speed you toward your goals.

All of PPI's team of finance experts are suitably qualified not just in finance lending, but property investing also.

PropertyCoach



Personal meetings
Contact your coach using any communication channel you like.



Finance Structuring
We help you structure your finances correctly from the start.



Investment Strategy
Guidance to choose your investment strategy and your outcome.



Action Plan
A sure way to know how to take your next step.



Professional Network
Access to a large network of property professionals across the country.



Events & Workshops
Invites to exclusive networking events and investing workshops with guest speakers.



Portfolio Management Tools
Tools and support to help you watch, manage and grow your portfolio.



Property Education Kit
One of the most comprehensive property investment guides in the industry.



Research
Updates from our full-time research team to keep you ahead of the curve as well as tools to help you research areas and properties.



Off market deals
Be the first in the country to see PPI's preferred off market deals from developers and agents across the country.



Property Investment education & advice to help you invest by implementing the right strategies to **achieve your goals**. Powered by hundreds of tools & resources plus market research to **empower you to achieve**.

PPI RESEARCH



1



IDENTIFYING & SHORTLISTING HOTSPOTS

2



AREA ANALYSIS & SCORING

3



IDENTIFYING HOTSPOTS WITHIN HOTSPOTS

4



PROPERTY SELECTION CRITERIA

Research is the backbone of building a profitable property portfolio. our research department ensure we are pro-actively finding and researching the best locations Australia wide.

We incorporate independent research that is sourced from Australia's leading research providers with our **4 phase research model** to identify and score the best areas within each state across the country.

Portfolio Property Investments **4 Phase research model** is one of the most thorough & concise research models in the market.

Portfolio Property Investments **4 phase research model** scores each area in detail by looking at many factors including a range of data and recent market trends which we utilise to identify key locations about to experience an upturn. Some of the factors we analyse when scoring our hotspot locations include:

- Infrastructure Investment
- Projected Capital Growth
- Rental Yield
- Vacancy Rates
- Population Growth
- Affordability
- Supply & Demand
- Economic Data
- Industry Support
- Historic Trends

This combination of our thorough area analysis gives us a good indication of where an area is at on the property clock ensuring we invest in the right market at the right time, with all the fundamentals in place **to achieve** long term capital growth.

OUR CLIENTS



FIRST TIME INVESTORS

Purchasing your first investment property can be more than challenging, PPI work with you personally to ensure that you are making the best decisions and setting yourself up for success. Your first purchase is the most important, getting it wrong can set you back financially and add years to growing a successful portfolio. Getting the right advice from the start could mean you end up having a better performing portfolio than doing it yourself.



SEASONED PROPERTY INVESTORS

PPI's aim is that all of our clients become seasoned, multi property investors. We ensure you spread your risk across different property markets and types and always have an exit strategy if you need it. Only 3% of tax payers have more than one investment property. If it was easy, everyone would do it right? PPI help you to become and stay part of the minority of property investors and build a truly successful multi property portfolio.



BUSINESS OWNERS

Being a business owner makes building a property portfolio a little bit different than people with a regular income. We help you navigate these challenges when it comes to financing and time restrictions that come with running your own business. Buying an investment property and building a portfolio can have adverse implications on the running of your business if its not managed properly. The team at PPI will work with you to understand your particular challenges and help you successfully invest in property



PROFESSIONALS AND MEDICAL

With a high income comes little time to take the time needed to invest properly in property. PPI can do all of the hard work for you which allows you to focus on what you want to do. Time poor investors with a high net wealth or income often need an easy but profitable solution when it comes to investing in property. We liaise with you in a way that works for you and help you invest to achieve the outcome you want from your hard work.



SELF MANAGED SUPER FUND INVESTORS

Buying property using a SMSF is becoming one of the most popular ways for people to control their Super. However it isn't for everyone, but if it is for you then theres a wide range of challenges that need to be addressed before buying property using your SMSF. PPI can assist with partnering you with the right team to set up and buy property using your SMSF and then we can help you as you go through the property purchase phase also.



Property Investment Search

Property Investment Search assists investors to find investment property opportunities right across Australia based on their strategy for building wealth through property. Then, you can select the type of property you want to buy.

BUY & HOLD

CASHFLOW POSITIVE

EQUITY CREATION

JOINT VENTURES

SMSF

DISCOUNTED BUYING

DEVELOP

START

Strategy Selection
Finding out what you want a property to achieve for you

1

6

Cash flow analysis
You get a personalised Cash flow analysis for each property

5

7

Review
We show you what we've found

8

Property Due Diligence
We then conduct full due-diligence on your chosen property

9

Select
You choose the property that works best for you

14

Insure
We won't leave you in the lurch, we will arrange for your property to be fully insured

13

15

Find tenants
So you don't get stuck without tenants, we will find them for you and arrange a property manager

16

PAYG withholding variation
The perfect way to increase your cash flow

17

Depreciation report
This will make sure you reduce your tax as much as you can



Property Investment Search

Property Investment Search is built for the investor in mind, delivering you quality information about the area and the property itself so you can make the right decision and grow your property portfolio. **It really does make the search simple.**

HOUSE & LAND

APARTMENTS/
TOWNHOUSES

OFF THE PLAN

ESTABLISHED

DUPLEXES

STRATA TITLE

RENOVATE

SUBDIVIDE

Finance due-diligence
Understanding your financial capabilities to purchase

2

Brief

Find out what you need in a property to achieve your desired outcome

3

Analyse

When we find a selection, we conduct our research on the area and the property

4

Search

We search Australia wide for the property that works for you

Negotiate

We get the best deal for you

10

Contracts

Contracts can be confusing, don't worry, we do all that too

11

Handover/Settlement

We arrange independent handover of the property and collect the keys

12

Construct

If its a new house, we manage the construction for you too

EOFY preparation

We help you get everything ready for your accountant at the EOFY

18

**WATCH
MANAGE
GROW**

WATCH

Too many investors buy a property and let it sit, which is a great investment strategy. However if you fail to watch your property investment properly, you won't know how or when to make changes to improve its performance and increase the return on your investment.

At **Portfolio Property Investments**, our hands on support and sophisticated tools help you to watch your properties performance, so change can be easily implemented as soon as it is needed.



Tenants



Property Condition



Area Performance



Cash Flow



Mortgage

MANAGE

With any large financial investment like property, managing its performance is crucial to gaining the financial outcome it is meant to provide. In todays market, factors are continually changing including **finance, capital growth, returns, cost of maintenance** and more.

Having the support of a professional property investing team allows you to implement changes as soon as they are required. This minimises your risk and increases your return on investment.



Finance



Capital Growth



Returns



Cost of Maintenance

PORTFOLIO MANAGEMENT



GROW

If you watch and manage your investment property portfolio properly, you will be able to grow your portfolio & wealth much easier and sooner than most. With a high performing portfolio, you will have much greater leverage and stamina to keep investing to grow a multi property portfolio.

Portfolio Property Investments can work with you to present ways you can grow your portfolio in a safe and low risk way that works for you and helps you **achieve your goals** through property investing. By knowing what position you are continually in, you can take advantage of great opportunities with the market place and build your wealth through property easier.



Sell



Research



Buy

A trusted property investment firm that's really focused on helping you **achieve your goals** in a way that works for you.

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