Tax Planning
Tax Effectiveness

BC

	You	Your Partner
Are you a PAYG employee or do you run your own business?		
If you are self-employed, what is the ownership structure of your business (i.e. do you run your business through a company, a trust or through a personal ABN)?		
What do you do for a living? (i.e. what is your occupation?)		
Is there a risk that you would be personally sued?		
Are you required to hold professional indemnity insurance and public liability insurance?		

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	You	Your Partner
What is your gross income per year? (if you are self-employed write down your business profit before tax)		
Do you want to be able to offset property investment losses against your personal taxable income?		
If you already have an Investment Property Portfolio are you paying land tax? If so, how much?		
Do you have children or planning to start a family?		
Will your personal situation change in the short-medium term (eg. Reducing from 2 incomes to 1)		

THE RISE HIGH INVESTOR

Tax Planning
Asset Protection

BC

	You		Your Partner	
	Assets	Ownership Structure	Assets	Ownership Structure
What assets (shares, real estates, superannuation, etc) do you have?				
Are you a risk taker or risk adverse?				

Tax Planning
Long term strategy

BC

	You
Why are you buying this investment property? (ie. will it always be an investment property or do you plan to live in it at some stage?)	
Do you plan to "buy and hold" or subdivide/develop in the future?	
How long do you plan to hold the property for?	
When do you want to retire?	
How does this property fit into your long term retirement plans?	

Tax Planning
Long term strategy

BC

	You
How many properties do you intend to add to your Property Portfolio in the future? Or if you are not sure on the number of properties write down the total value that you want to build your property portfolio to.	
Are you more interested in saving money in the short term or maximising your long term tax deductions and ensuring the structure meets your needs in the future?	