

Your Property Investment Plan

THE
RISE HIGH
INVESTOR



A Plan That Can Change Your Life

The Rise High Investor Property Investment Plan sets you up to achieve your financial dreams and retire on your terms.

Most investors make these 4 common mistakes:

1. **Buying the Wrong Property** – Choosing the wrong property and/or in the wrong location and/or for the wrong price
2. **Using the Wrong Ownership Structure** – Potentially impacting portfolio returns and tax effectiveness
3. **Lack of Strategy** – investing and making important decisions without a clear focus, strategy and direction
4. **Procrastination** – delaying decisions or getting stuck in analysis paralysis which leads to missed opportunities

With a customised Rise High Property Investment Plan, you'll gain:

- **Clarity** on how to make your money **work harder for you**.
- A **clear roadmap** to set yourself up to **achieve** the **wealth** and **passive income** you need to **set you free** (bold wealth, passive income and set you free)
- An easy-to-follow plan **outlining** how many properties to buy, when to buy them, and the parameters for choosing the right properties.
- **Confidence** to **avoid to avoid the 4 key mistakes** that property investors makes (bold 4 key mistakes)
- A **long-term forecast** of your cash flow, borrowing capacity, and wealth up to and beyond retirement.
- **Visibility and control** over your finances like never before.
- And much more...

Your Customised Plan Will Include:

- Over **30 pages** of huge value specific to you
- A **1 on 1 goal-setting** meeting to understand what your goals are and what financial freedom means to you (bold goal-setting)
- A **complete** review of your finances to identify opportunities to optimise your savings and cashflow
- The **6 essential steps** to building a successful property investment portfolio
- Projections for **passive income, cash flow, portfolio value,** and **equity** throughout your property investment journey and into retirement
- **Borrowing capacity, savings and superannuation** balance forecast (bold borrowing capacity, savings and superannuation)
- **Scenario modelling** to work out your best strategy forward (bold scenario modelling)
- A final meeting to present you your Property Investment Plan and **guide** you through the next steps
- **Educational content** on becoming a successful property investor
- And so much more...

Know Your Magic Numbers

You are Here - June 2024

Joe and Jane, you are a couple without any dependents and have just purchased your first home recently.

Your plan is to retire at the age of 50 on a passive income of \$125,000 per year (in today's value) to be able to be financially free in 15 years so that you can live life on your own terms.

You are keen to utilize property as an asset vehicle to assist you in achieving your financial dreams and goals.

Magic number

4
Investment
Properties
to acquire

\$2.72m
asset base
by 2027

\$125k
passive
income by
2040

Based on the Rise High Investor Property Portfolio Plan, you will need to acquire 4 properties over the next 3 years with a asset base of \$2.72m to achieve your desired passive income of \$125,000 per year at age 50.

Benefit achieved by implementing the Rise High Investment Property Portfolio Plan

	Do Nothing	Property Plan	Benefit
Equity value at retirement (excl PPOR)	\$0	\$6,944,176	\$6,944,176
Total Passive Income (per year) at Retirement	\$30,000 (assume \$20k p/a for 30 years at 5%)	\$125,251	\$95,251

How many properties and by when?

Proposed Property Portfolio by 2027



Principle Place of Residence

Value	= \$1,582,632
Home Loan	= \$180,307
Equity Loan for Investment Property 1	= \$160,680
Equity Loan for Investment Property 2	= \$180,440
Equity Loan for Investment Property 4	= \$179,400



Investment Property 1

Target Year Purchase	= 2025
Target Value	= \$580,000
Investment Loan	= \$464,000



Investment Property 2

Target Year Purchase	= 2025
Target Value	= \$618,000
Investment Loan	= \$494,400



Investment Property 3 (SMSF)

Target Year Purchase	= 2026
Target Value	= \$618,000
Investment Loan	= \$492,000

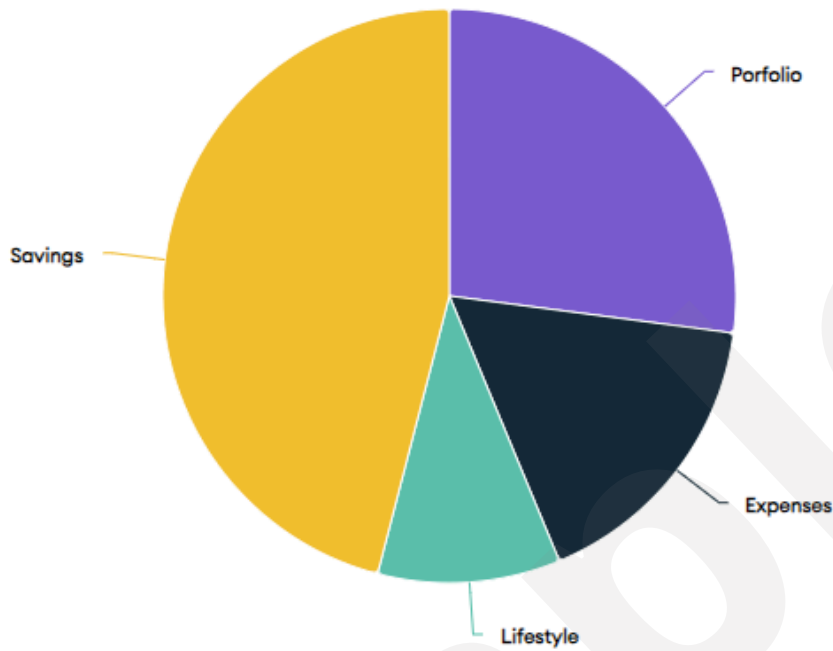


Investment Property 4

Target Year Purchase	= 2027
Target Value	= \$690,000
Investment Loan	= \$552,000

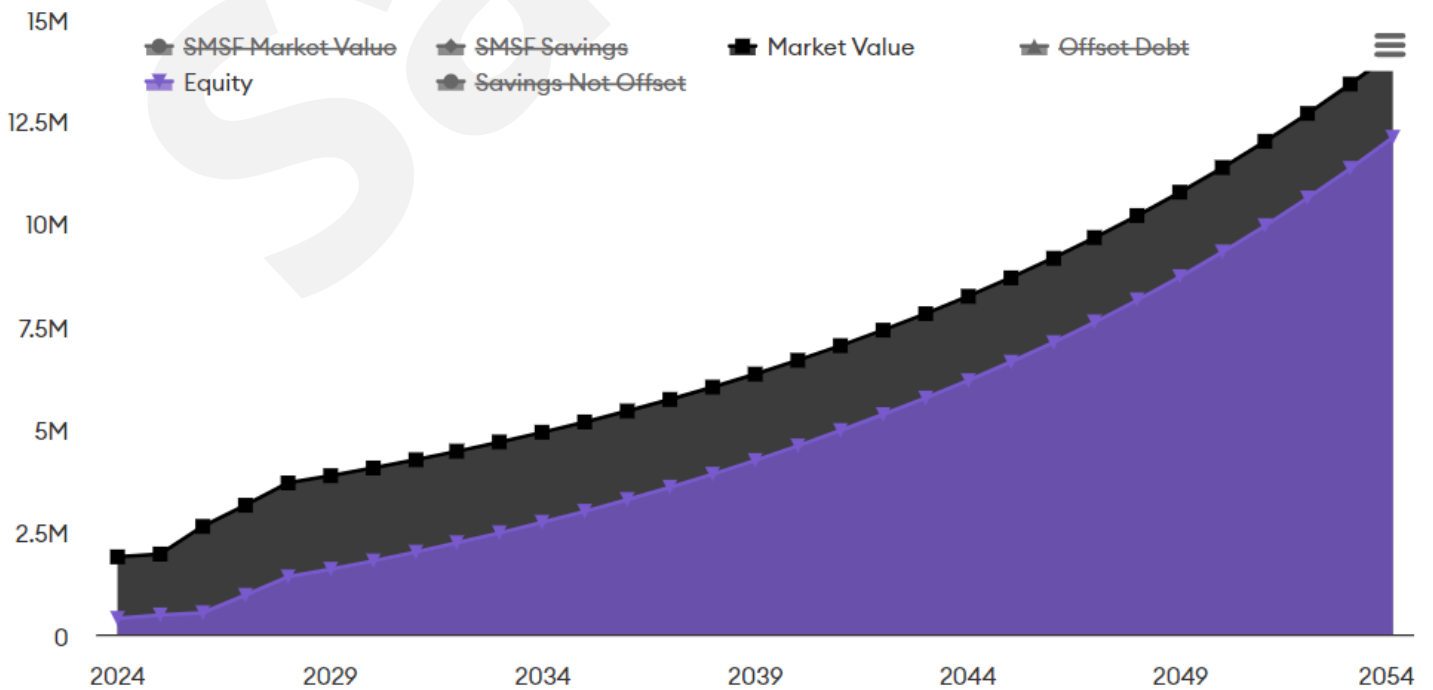
Type	Target Value	Target Date	Target Growth	Target Yield
Investment Property 1	\$580,000	2025	6.0%	4.75%
Investment Property 2	\$618,000	2025	6.0%	4.75%
Investment Property 3	\$694,000	2026	6.0%	4.75%
Investment Property 4	\$690,000	2027	6.0%	4.75%

Your Cashflow and Savings Position



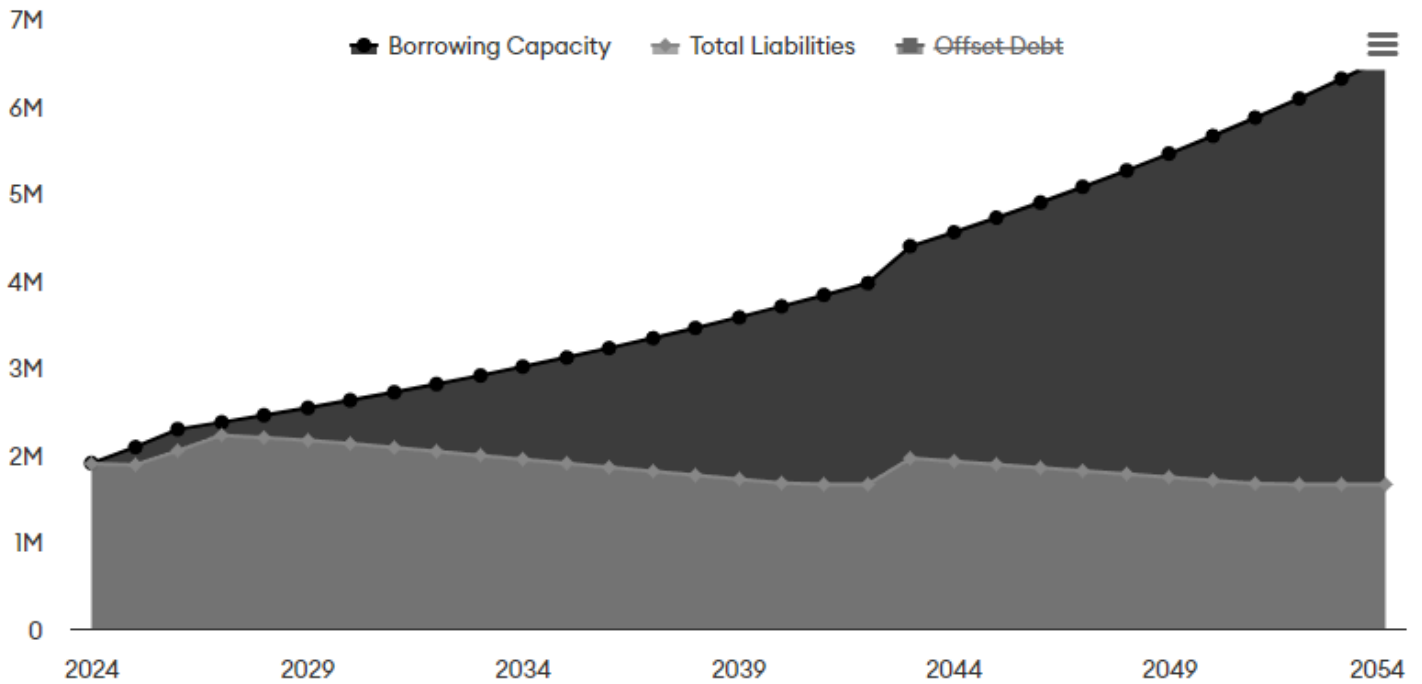
A detailed analysis of your current cashflow position, identifying **opportunities** and setting up your **Pay Yourself First System**.

Your Potential Equity/Wealth Projection



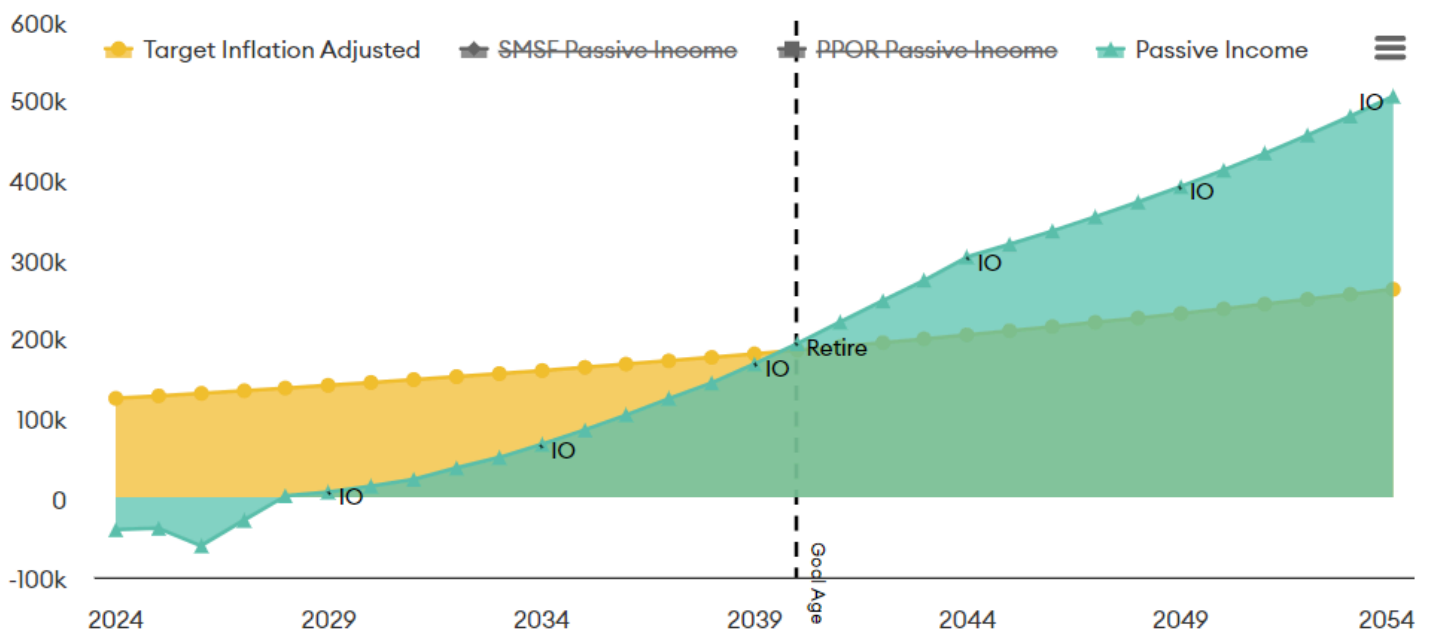
What your potential **equity and wealth** projection looks like throughout your investment journey by following the plan.

Borrowing Capacity and Indicative Timeline of Purchase



A clear and actionable plan of how you are going to **accumulate** your properties based on your **borrowing capacity**, and also how you are going to **eliminate** your debt.

Achieving your Passive Income Goal



Visualize how you are going to achieve your **passive income** goal at your desired retirement age based on the lifestyle that you dream of.

GET STARTED ON YOUR VERY OWN PLAN TODAY



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