

Property Investing Made Easy

A practical guide to expanding your services and growing revenue



Property

At Next Level Property, we help you provide a more complete service to your clients and give your business a new revenue stream.

Next Level Property is a reputable property investment firm that specialises in building partnerships with financial planners, accountants, mortgage brokers and other professional advisors.

We help firms like yours enhance their existing offerings by bringing 'property' into their service portfolios. Easily and cost-effectively.

Property is more than just a logical extension to the services you offer. It also brings many immediate benefits to your business – including a lucrative new revenue stream. And that's just the beginning.

Discover how easy it is to start offering your clients a wide range of property solutions.

Why offer property solutions to my clients?

You help your clients with their finances everyday. But who do they talk to when it comes to finding the right property?

Clients now expect much more from their advisors. They expect to be able to turn to the people they trust to discuss any financial issue they face – including the varied investment opportunities available to them.

So if you're not giving your clients the property advice they're looking for, they'll find someone who can.

Next Level Property holds a full real-estate licence. By partnering with us, you can offer your clients a wide range of flexible and practical property solutions; everything from the purchase of their family home, through to exciting investment property opportunities.

Plus, by working with us you will be perceived as a proactive and trustworthy professional who considers your client's financial situation from all angles. Your clients will see as you looking after their best interests over the long term.

What are the benefits to my business?

A more valuable client relationship

Too often, the first you will hear about your client's investment decisions is when things have gone wrong. But do you want to continue being perceived as just a reactive problem-solver?

Show your clients you are prepared to take a proactive stance in managing their financial affairs. Exceed their expectations. In turn, you'll improve the scope and value of your client relationships.

Stay ahead of competition

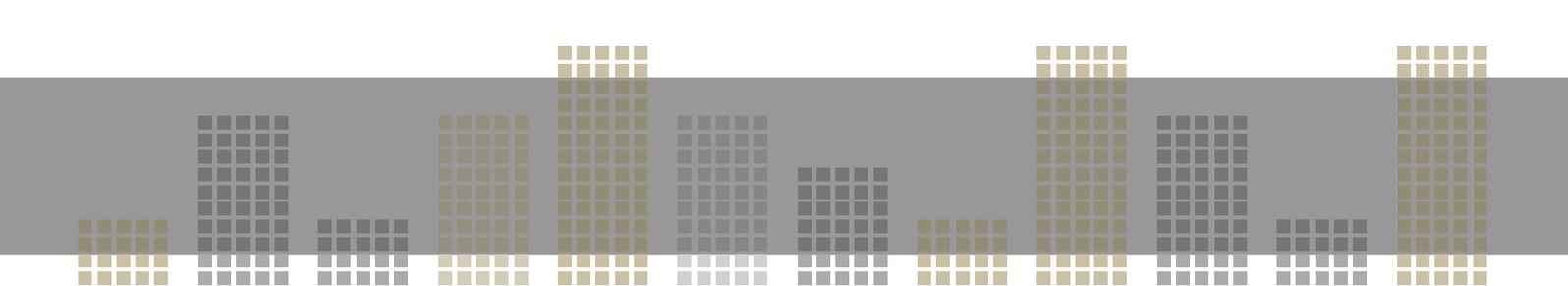
Many of your competitors are expanding their businesses to provide a full range of financial services. This is your chance to make sure you don't get left behind.

Increase your revenue – with minimal effort

Every client you successfully refer to us entitles you to a lucrative referral fee payment. And the best part? The new revenue stream comes without the typical upfront work, investment and risk.

Increase the value of your business

Upgrading and expanding your services is one of the most effective strategies for boosting the overall value of your business.



Who will 'own' my clients?

It's no secret that if your client relationships are strong, your referrals will be a lot more promising and valuable to us. So it's important - for you and us -that you retain full ownership of your clients.

In practical terms this means we can make our services seamless to your clients. They will picture us as simply another arm of your business. We are happy to meet them in your office and on your terms, keeping you involved and informed at every step.

What are the risks to my business?

We take on all the risk.

When you partner with us, you are removed from all property advice liability. This means no risk to your licence or professional indemnity cover.

What services does Next Level Property offer?

At Next Level Property, we have an expansive list of property-related services. And remember that the services we offer are the same services you can offer your clients.

Let your clients know what is now possible.

Purchase off-the-plan

Next Level Property always has an attractive list of boutique developments in well-researched locations on offer. Give your clients the exclusive opportunity to purchase highly sought-after townhouses and apartments off-the plan.

Buyers' advocacy

We can search for and buy properties on your clients' behalf.

Self-managed superannuation funds (SMSF)

We give your clients recommendations on property that is specifically designed and packaged for self-managed superannuation funds.

Property syndication

A flexible approach to property investment, property syndication allows clients to invest in property in partnership with other investors. We'll tell you when an attractive syndication is on offer. And your clients will be the first to know.

Property management

We can manage your clients' properties. That means everything from finding the right tenants to reliably managing the property over the long-term.

Cash flow projections

We prepare fully detailed cash flow projections for your clients' potential property investments.

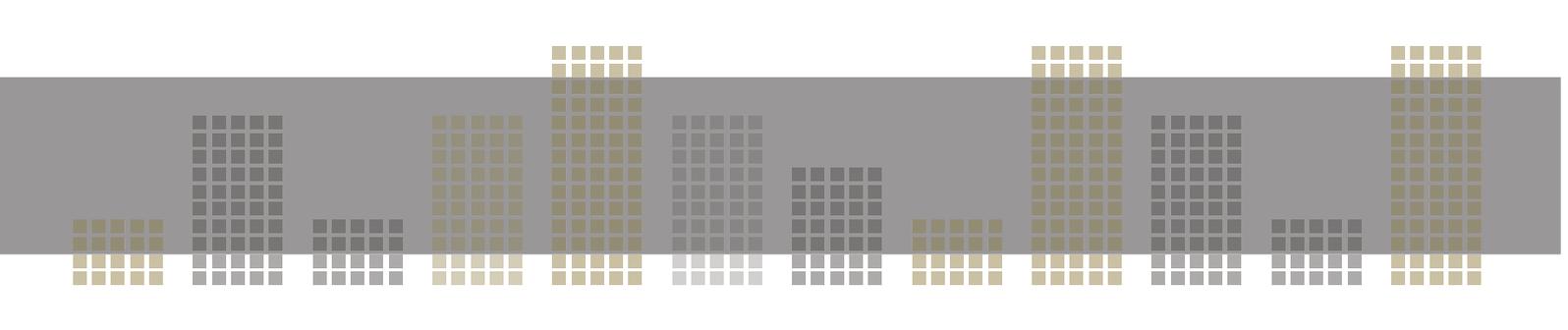
Finance solutions

We even have an in-house finance specialist that can review and select the right mortgage or investment loan for your clients.

What are the steps in the referral process?

Although every client is different, this is typically what happens.

Step	What happens?
1. Referral takes place	<p>You refer a client to Next Level Property.</p> <p>We acknowledge receipt of your referral.</p>
2. Initial client meeting	<p>We meet with your client (and preferably you too) to discuss their circumstances and investment needs.</p> <p>By this stage, the client should be thinking about pre-approval for finance. If this has not already been arranged, Next Level Property can help.</p>
3. Research and analysis	<p>After assessing the client's circumstances, we create a general or personal 'Property Investment Analysis' (or several if needed).</p>
4. Client recommendations	<p>Next Level Property meets with the client again to present a carefully selected property portfolio. We then recommend that one or more of these properties be purchased.</p> <p>At this point, Next Level Property will inform the client what is involved in purchasing a property – namely signing a contract and paying a deposit. In some cases, there may be a reservation form that needs to be signed to ensure the property is not sold to another party while contracts are being organised.</p>
5. Client decides to purchase	<p>Once the client confirms they wish to purchase, we coordinate the contract signing and organise the deposit.</p>
6. Referral fee payment	<p>For a development property, 50% of your referral fee is paid at this stage. For an established property, your entire referral fee is paid at this point.</p> <p>In all cases, we pay your referral fee immediately after the client or developer pays us.</p>
7. Pre-settlement	<p>If the client has purchased a development property, we continually keep you and your client informed about the progress of construction.</p> <p>When the construction is almost complete, we advertise for tenants.</p>
8. Settlement	<p>Next Level Property arranges the residential tenancies lease and then manages the property on your clients behalf on an ongoing basis.</p> <p>We also organise and pay for a depreciation schedule to help the client maximise their investment.</p>
9. Second referral fee payment Development property only	<p>After settlement, the remaining 50% of your referral fee is paid.</p> <p>Again, we pay your referral fee immediately after the developer has paid us.</p>



Why choose Next Level Property?

The right background and experience

We have the right expertise to ensure your clients are always given the most up-to-date and reliable property advice.

Next Level Property founders Andrew Oscari and Julian Millman come from strong backgrounds in real-estate and financial planning; bringing a unique set of complimentary skills to your clients.

Andrew has over 17 years experience in real-estate and property development and owned his own Ray White Real Estate franchise for a number of years. Julian has been a financial planner for over 14 years and ran his own successful financial planning business for six years.

Andrew and Julian are both passionate leaders with substantial specialist expertise. They have made a difference to the financial futures of many people and are well known for the exceptional service they provide.

A more flexible and complete service

While there are other similar firms out there, you'll find none of them provide the same flexible service that we do.

Firstly, we cover all aspects of property – apartments, townhouses, established properties, commercial properties and syndication.

Also, while other firms only offer inner-city apartments, our off-the-plan opportunities cover all areas. This means we always make recommendations that match the client's needs – rather than forcing them to fit ours.

A professional team that won't discredit you

We are a respected, hard-working team with integrity. We won't discredit you – or your business name.

When you refer a client to another professional, it's always a risk. After all, who you choose to do business with says a lot about your own business values. And no one wants their own reputation being compromised.

In this industry, reputation is everything and we are fiercely protective of ours. Just like you are of yours.

That's why we encourage you to meet with us and decide for yourself. It won't take you long to work out how we operate - and how easily we can add value to your business.

Want to find out more?

Contact Andrew or Julian from Next Level Property today.

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