



LEADING THE INVESTMENT PROPERTY INDUSTRY

### PROPERTY REFERRAL FORM

The form can be completed electronically and ensure all fields in **bold** are completed.

#### GENERAL DETAILS

**Date of Referral**

**Referrers Name**

**Referrer Mobile**

**Referral Company**

**Client Name**

**Client Name**

**Mobile**

**Mobile**

**Client Email**

**Client Email**

**Client Postal Address**

**Client Residential Address**

#### FINANCIAL DETAILS

**Borrowing Capacity (\$)**

**Purchase Price (\$)**

**Available Cash (\$)**

**Available Equity (\$)**

**Funds in Super (\$)**



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## PROPERTY REFERRAL FORM

### PROPERTY PURCHASE DETAILS

TYPE OF PROPERTY REFERENCE if any.

Unit  Townhouse/Villa  House  House & Land  New  Existing

VEHICLE OF PURCHASE

Individual  SMSF

LVR  LVR

PURCHASE STRATEGY

Yield  Capital Growth  Mortgage Reduction  Positive Gearing  Neutral Gearing  Negative Gearing

PREFERRED SETTLEMENT TIMEFRAME (e.g. < 2 months, < 6 months, < 12 months, long term up to 2 years)

NOTES