



## PROPERTY INVESTMENT ANALYSIS PARA-PLAN REQUEST

Analysis of cashflow support, gearing impact, holding structure, rate of return, sensitivity projection etc.

### Part A: Financial Planner Details

First Name:	Last Name:	
Company Name:		
AFSL Licensee:	AFSL No:	AR No:
Address:		
Town/Suburb:	State:	Post Code:
Phone:		
Email: <span style="float: right;">(please check carefully)</span>		

### Part B: Super Fund and Client Details

Fund Name:			
Members:			
Date of Birth:	__/__/____	__/__/____	__/__/____
Accumulation Balance:	\$	\$	\$
Pension A/c Balance:	\$	\$	\$
Salary:	\$	\$	\$
Salary Increases % p.a.:	%	%	%
Years to Pension Status:			

### Part C: About the Proposed Property

Property Type:	<input type="checkbox"/> Commercial <input type="checkbox"/> Residential		
Purchase Price *:	\$	Purchase Costs \$	Stamp Duty \$
Property Appreciation % p.a.:			
Rental Details.:	\$	pw for	weeks pa. Yearly Increases %

\* For existing properties show current value and cost base in comments.

**Part D: Ongoing and Borrowing Costs**

Yearly Ongoing Expenses:	Personally Held \$	SMSF \$	Increases:	% pa
Depreciation pa:	\$ (or provide Schedule)			
	Personally Held	LRBA		
Loan Amount:	\$	\$		
Interest Rate % pa:				
Loan Type:	<input type="checkbox"/> Interest Only	<input type="checkbox"/> P&I	<input type="checkbox"/> Interest Only	<input type="checkbox"/> P&I
Repayments pa:	\$	\$		

**Part E: Sales Costs & CGT Information**

Current Sale Costs:

\$

Sale Costs Increases % p.a.

**Part F: Additional Comments****Fees:**

\$440 (including GST). Turnaround time anticipated within 3 working days.

**Further Details and Contact:**

Please email this data form to [brian@netactuary.com.au](mailto:brian@netactuary.com.au) or phone Brian on (03) 6224 1145.

**DETAILED SALARY INFORMATION**

Year	Salary	Year	Salary	Year	Salary	Year	Salary	Year	Salary
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	

**DETAILED YEARLY EXPENSE INFORMATION**

Year	SMSF Yearly Expense	Year	SMSF Yearly Expense	Year	SMSF Yearly Expense	Year	SMSF Yearly Expense	Year	SMSF Yearly Expense
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	

Year	Direct Yearly Expense	Year	Direct Yearly Expense	Year	Direct Yearly Expense	Year	Direct Yearly Expense	Year	Direct Yearly Expense
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	

**DETAILED DEPRECIATION INFORMATION**

Year	SMSF Depreciation	Year	SMSF Depreciation	Year	SMSF Depreciation	Year	SMSF Depreciation	Year	SMSF Depreciation
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	

Year	Direct Depreciation	Year	Direct Depreciation	Year	Direct Depreciation	Year	Direct Depreciation	Year	Direct Depreciation
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	

**ADDITIONAL REPAYMENTS**

Year	SMSF Add Payments	Year	SMSF Add Payments	Year	SMSF Add Payments	Year	SMSF Add Payments	Year	SMSF Add Payments
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	

Year	Direct Add Payments	Year	Direct Add Payments	Year	Direct Add Payments	Year	Direct Add Payments	Year	Direct Add Payments
Yr 1		Yr 6		Yr 11		Yr 16		Yr 21	
Yr 2		Yr 7		Yr 12		Yr 17		Yr 22	
Yr 3		Yr 8		Yr 13		Yr 18		Yr 23	
Yr 4		Yr 9		Yr 14		Yr 19		Yr 24	
Yr 5		Yr 10		Yr 15		Yr 20		Yr 25	