

We place extreme importance in determining our clients' needs and strive to provide the most suitable investment strategy so that our clients can achieve their investment goals.

In order to do so, we appreciate your time in filing out the questions below so that we can assist you better.



YOUR FIRST LEAD TO REAL WEALTH

TAKE CONTROL OF YOUR FINANCIAL FUTURE WITH FIRST LEAD

www.FirstLeadInvestments.com

Investment Objective

i) What is your main goal for investing in a property portfolio? Please rank the below options accordingly (#1 being most important).

Wealth creation & preservation Recurring income Capital gains and growth Others: Please specify

ii) At this stage of your life, what is your greatest financial concern?

- Generating enough income to support current lifestyle
 Generating more income to improve current lifestyle
 Saving for retirement
 Saving for your children education : where
 Not too much concerned at the moment

iii) Based on your current wealth/income, when do you think you can retire?

- Right now Within 5 years Within 10 years More than 10 years time

What will be your main source of retirement income now and what do you wish to do to improve it?

iv) In how many years time do you see yourself committing a large outflow of funds?
(e.g. purchase of property, children's overseas education, etc.)

- 1-3 years 3-7 years 7-10 years Not in the foreseeable future

What will be your main source for this funding?

v) Which are the countries you would like to include in your property portfolio? *(Rank them by #1 being most important)*

- Australia UK USA New Zealand Others, please specify

Please explain what motivates your decision?

vi) Tell us about your experience in property investment. Any good and bad experience to share?

vii) What are the areas you would like First Lead to assist you :

- Planning and structuring the purchase
 Financing the purchase and refinancing for extra funds
 Leasing and management
 Reselling your investment property
 Migration
 Taxation and international estate planning
 Identifying investment opportunities including for development

I/We would like to join First Lead Investment Club

Client signature
 Date

Singapore

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Source

Referral :
 Agent :
 Bank :
 Others :

Name
 Project
 Purpose of Discussion
 Follow-up Appointment
 Date Time
 Venue

Tell Us About Yourself

1/ Mr Mrs Miss Ms or specify other Title
 Surname Given name(s)
 Age Birth date (dd/mm/yy) I.D. card / Passport #
 Relationship Mobile Email

2/ Mr Mrs Miss Ms or specify other Title
 Surname Given name(s)
 Age Birth date (dd/mm/yy) I.D. card / Passport #
 Relationship Mobile Email

3/ Mr Mrs Miss Ms or specify other Title
 Surname Given name(s)
 Age Birth date (dd/mm/yy) I.D. card / Passport #
 Relationship Mobile Email

Home address Home telephone #
 Post code

Ages of your dependant children
 Child 1 Child 2 Child 3 Child 4

Client 1 - Work Telephone # Client 2 - Work Telephone #
 Part-time Full-time Other Part-time Full-time Other
 Occupation Occupation

Description of the nature of your business / work / years

Knowing your financing standing / networth

(This information is optional, it will be treated as strictly private and confidential and will be used only to assist in planning your property portfolio)

Property	Market Value	Lender	Loan Amount	Net Equity	Monthly Repayment	Monthly Rent
Property 1						
Property 2						
Property 3						
Property 4						
Property 5						

Deposits and investments (funds, shares, bonds etc)

Your monthly budget

Salary [attach salary slip(s)]		Payments / Spending Budget	
	Gross salary	After tax salary	
Prime income earner	<input type="text"/>	<input type="text"/>	Home mortgage(s) <input type="text"/>
Joint applicant(s) (if joint loan)	<input type="text"/>	<input type="text"/>	Investment mortgage(s) <input type="text"/>
Other income (please attach evidence)	<input type="text"/>		Other bank loans <input type="text"/>
Self Employed Applicant(s)	Net profit	After tax profit	Credit card account(s) (Visa, etc) <input type="text"/>
	<input type="text"/>	<input type="text"/>	Other loan(s) (Car, tax, etc) <input type="text"/>
			Rent, rate, management fee <input type="text"/>
			Insurance (Life, health, car, etc) <input type="text"/>
			School fees <input type="text"/>
			General living & entertainment <input type="text"/>
Total net income per month	<input type="text"/>		Total expenses per month <input type="text"/>
			Total expenses include repayment <input type="text"/>

BUDGET SUMMARY

Remarks

Financial Analysis For This New Purchase

Property price

Estimated initial outlay (most expenses are one off)

Down payment required now

Balance payment upon settlement (depending on loan ratio)

Stamp duty

Legal and disbursement cost

Bank fees, valuation fee, etc.

Misc.

Total cash required

Total funding / loan required

Loan repayment (type / years)

Remarks

Annual Cash Flow From This Property

Estimated annual rental

LESS estimated annual outgoing :

Repayment of loan

Insurance cost

Water and council rates

Body corporate

Leasing management fee

Misc.

Net annual cash flow

Cash return on capital Investment

Estimated capital growth rate per annum

Estimated rental yield rate per annum

Disclaimer : The information provided herein is for illustration purposes based on certain assumptions. All information provided is in good faith from sources deemed reliable. While the greatest care is taken to ensure that the information contained herein is accurate, no responsibility is accepted for any errors. Investors should conduct their own enquiries before making any investment decision.