



GUARDIAN PROPERTY SPECIALISTS

Research Analyse Purchase

Referral Form

Phone: 1300 558 001 Fax: 02 9891 5599

Email: info@gpsnetwork.com.au

PLEASE CALL CONSULTANT FIRST:

Date: ____/____/____
YES / NO

YES / NO

PLEASE CALL CLIENT FOR CONTACT / APPOINTMENT:

**APPOINTMENT MADE/CONFIRMED FOR:
APPT DATE**

**YES / NO
APPT TIME**

Client Name(s): _____ (client 1)

_____ (client 2)

Consultants Name: _____

Consultants Mobile: _____

Address: _____

Decision Maker: client 1 client 2

Hm Ph: (client 1) _____

Hm Ph: (client 2) _____

Wk Ph: (client 1) _____

Wk Ph: (client 2) _____

Mb Ph: (client 1) _____

Mb Ph: (client 2) _____

E mail: _____

(Client 1) Self Employed: Yes / No, Years Employed: _____
Casual

Status: Perm / Part-time /

(Client 2) Self Employed: Yes / No, Years Employed: _____
Casual

Status: Perm / Part-time /

Finance Details: Pending / Pre-approved

Property Price Range (including costs): \$ _____

Comfortable Weekly Contribution: \$ _____

Current no. investment properties: _____

When likely to purchase: ASAP 1 - 3 months 3 - 6 months 6 - 12 months

Interests and Concerns:

- First time investor
- Experienced investor
- Long term focus
- Plans to occupy

- Capital growth
- Positive cash flow
- Tax savings
- Own super fund

- Retirement planning
- Financial security
- Tenancy/vacancy rates
- FIRB approved

State:

NSW QLD VIC WA Other



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Notes:

