

DEVELOPING A ROBUST BUSINESS CASE:

The Green Pen Property Audit™

Drivers of population growth/ capital growth/yield increases	Known committed infrastructure spending	Real Estate Stats (e.g. vacancy rates, days on market, average annual growth, average yield)	Financials (e.g. yield, cash on cash return, expected annual growth, net cash flow, depreciation benefit tax saved, cost to hold, projected profit in 10 years, upfront uplift)	Specific attributes (e.g. curb appeal, potential maintenance, ease of rental)
		<hr/> Review all media sources		

THE GLOBAL CITIZEN MATRIX™

Determine Percentage of Assets you would like within each market and associated returns:

NOW:

**Total Assets
Now:**

**Potential
Current Market
Split**

Australia

United States

**Average
Expected
Capital Growth**

**Average
Expected
Cash Flow**

THE GLOBAL CITIZEN MATRIX™

Determine Percentage of Assets you would like within each market and associated returns:

5 years:

**Total Assets
Now:**

Australia

United States

**Potential
Current Market
Split**

**Average
Expected
Capital Growth**

**Average
Expected
Cash Flow**

THE DIVERSIFICATION AUDIT TM

How much have I considered the following when I think about diversification in my property investing?

1. Geography



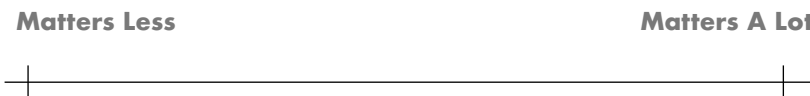
2. Type of Property



**3. Macro & Micro
Economic Risk**



4. Strategy



THE PROPERTY STRESS TESTER™

Asset Address:

Expected Annual \$

If

Rental

- 10% A

Property Cost

+ 10% B

Interest

+ 10% C

Maintenance

+ 10% D

If A or B or C or D

Perceived Impact

THE FAMILY WEALTH CHARTER FRAMEWORK™

Healthy beliefs about money I want my kids to learn:

Elements of a Wealth Family Charter that matter to me:

- 1. How often we meet
- 2. Family Values
- 3. What kinds of assets we like/don't like
- 4. How profits will be used
- 5. How the kids can participate
- 6. The rules of family money
- 7. How we might save towards bigger investments
- 8. How often we eat out/travel
- 9. Budgeting

Other Elements:

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