

Module 6: Property advice and the advice model

This module discusses the importance of working with clients in a way that builds their confidence and trust in the professionalism of the property investment adviser. We also take you through to completion of their service, including all six steps of the property investment advice model.



Your rapport and communication skills as a qualified property investment adviser are paramount to the successful relationship between adviser and client. These skills are explored in this module. We also cover the after purchase considerations and how to maintain a long-term relationship with your client, as well as things you'll need to consider such as recording and filing documentation and evaluating the success of the strategy on a longer-term basis.

All you need to do to ensure you can help your clients select, buy, manage, and realise the benefit of their investment, come together here. Module 6 takes you from selecting properties to meet your client's needs right through to helping clients review their investment strategies to make sure their investment aims, and goals are being realised.

Content outline

Topic 1 – Considerations for a property investment strategy

Topic 2 – The Advising process

Topic 3 – Concluding consultations with the client

Topic 4 – Evaluating performance

Topic 5 – Preparing and filing client documentation

Learning objectives

- + **Describe** the concepts of rental growth and return, capital growth and reducing tax
- + **Describe** risks associated with different property types such as residential, commercial, rural and specialist use
- + **Describe** the importance of determining the client's true investment goals and financial objectives
- + **List** potential risks in the investment property process such as gearing, illiquidity and market volatility
- + **List** the six steps in the property investment advice model
- + **Explain** the concept of rapport and why it is imperative in the Property Investment Adviser-Client Relationship
- + **Brainstorm** the essential elements of effective communication
- + **Describe** the importance and relevance of an investing timeline
- + **Set** SMART goals and help clients set SMART goals
- + **Describe** other complimentary services that you as a property investment adviser may offer and their applicability
- + **List** the steps to evaluate an investments performance including growth, rental yield, and loan product structures
- + **Explain** other factors such as market fluctuations, interest rate cycles and tenant issues
- + **Describe** and list the principles for on-going portfolio reviews with clients
- + **List** the necessary steps to effectively file documents and keep appropriate records
- + **Practice** using the property investment fact finder to maximum effect