

Sunshine Coast Property Investment Readiness Worksheet

This worksheet helps you assess whether you are financially and strategically prepared to invest in property on the Sunshine Coast. It provides general information only and does not consider your personal circumstances.

1. Investment Objectives

Primary goal (capital growth, rental income, or both):	
Planned investment timeframe (years):	
Preferred property type (house, unit, townhouse):	
Ownership structure (individual, joint, SMSF, trust):	

2. Financial Position

Estimated borrowing capacity (\$):	
Available cash deposit or equity (\$):	
Existing investment properties owned (number):	
Current interest rate (%):	
Cash buffer for rate increases (\$):	

3. Cash Flow Snapshot

Expected weekly rent (\$):	
Estimated weekly loan repayment (\$):	
Estimated weekly holding costs (\$):	
Estimated net weekly cash flow (+ / -):	

4. Risk & Strategy

Comfort with interest rate changes (low / medium / high):	
New or established property preference:	
Likely exit strategy (hold, sell, refinance, retire debt):	

5. Readiness Check

I understand my borrowing position (yes / no):	
I have a clear investment strategy (yes / no):	
I have considered tax and ownership implications (yes / no):	

6. Suggested Next Steps

Do I need lending or refinancing advice?	
Do I need structuring or tax guidance?	
Do I need suburb or market strategy advice?	
Who should I speak with next?	

Need help interpreting your results?

FAA Group provides licensed financial advice and property investment guidance across the Sunshine Coast.

Phone: 1300 49 11 41

Email: enquiry@faa.net.au

Office: Suite 3–7, Level 5, Tower 2, 55 Plaza Parade, Maroochydore QLD 4558

Disclaimer: This worksheet is general information only and does not constitute financial, taxation, or legal advice. You should seek advice from a licensed professional before making investment decisions.