

1-ON-1 PROPERTY PORTFOLIO REVIEW

BOOKING FORM

Kieran Trass 1-ON-1 PORTFOLIO REVIEW AND STRATEGY SESSION DETAILS

Kieran will personally review your existing portfolio, and consider your property wealth creation aspirations.

1-ON-1 Tailored experience to help you maximise the potential results from your existing portfolio and give you guidance and direction for the future.

Consultations are individually tailored based on your specific circumstances, needs and property investment aspirations.

THE PROCESS (Here's How It Works)

PREPARE- You supply Kieran with the details of your properties (in the supplied property portfolio schedule format), the signed Booking Form on the next page and deposit funds for payment based on your portfolio size (details are on the next page).

REVIEW – Kieran will analyse your current properties utilising his property intel review system and on-line data sources. This includes a review of each property you own plus Suburb insights for the suburbs your properties are located within. This information will be emailed to you prior to your 1-ON-1 meeting.

(Timeframe for completion varies depending upon the size of your portfolio but expect this review to take anywhere from a few days to a week or so).

1-ON-1 MEETING – With Kieran either in person if in Auckland or else via Zoom. Kieran will contact you to arrange a suitable time to meet to go over his review findings and suggestions for improvements where appropriate. This may include suggestions to reallocate resources, divest specific properties, invest in more property/ies.

WRITTEN OVERVIEW REPORT – After your 1-ON-1 Kieran will supply you with his final written overview report including recommendations for your next property purchase/s.

FOLLOW UP 1-ON-1 MEETING - With Kieran either in person if in Auckland or else via Zoom. Together we will review the Overview Report and recommendations and refine these where appropriate.

Email = info@TellMeTheTime.co.nz

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TO PROCEED WITH YOUR APPLICATION:

1. **COMPLETE** this page and your completed short form Property Portfolio Schedule
2. **EMAIL** them to kieran@tellmethetime.co.nz
3. **DEPOSIT** funds as follows:

PRICING (based on the size of your total property portfolio)

A) Under 10 properties = **\$3,000 + GST = \$3,450**

OR

B) Over 10 properties = **\$3,000 + GST plus \$100 + GST per property over 10**
(i.e 11 properties = \$3,100 + GST, if you have 12 properties = \$3,200 + GST etc)

N.B. The number of properties is based on separate Certificates of Title (ie if you have a block of 6 flats but they are on 1 Certificate of Title that = only 1 property)

BANK DEPOSIT DETAILS

Account Name : **Tell Me The Time Ltd**

Account Number : **38-9022-0746947-02**

Reference : **Please ADD YOUR SURNAME AND INITIALS**

YES Please contact me to commence my Portfolio Review

I have a total of _____ properties in my portfolio

Please issue paid GST invoice in the name of _____

FIRST NAME:

SURNAME:

EMAIL:

PHONE:

SIGNED.....

DATE/...../.....

Email = info@TellMeTheTime.co.nz