



**DYNAMIC
WEALTH GROUP**



**DYNAMIC
REALTY GROUP**













**DYNAMIC
FINANCE GROUP**

CAPABILITY STATEMENT



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Introduction



20+

Years combined experience

WA + QLD

Licensed Real Estate Agents

500+

Properties researched

40+

Data points + in house research

Our team works with first time investors learning the ropes, right through to seasoned investors with 5+ properties who are looking to grow and diversify their portfolio. Whatever your situation our team draws on years of personal and professional experience and we are dedicated to giving you the best quality service & customer care we possibly can.

Company overview



About Us

Dynamic Wealth Group brings together a Perth based finance & mortgage broking firm, with a boutique buyers agency focused on sourcing high performing properties to help you build a sustainable property portfolio and ultimately reach your financial freedom goals.

What sets us apart is our experience and pragmatic approach to investing in property. Our philosophy is simple, if we wouldn't buy it, neither should you. We also have a strong focus on education. We believe a great investor should not only seek professional help, but also educate themselves along the way.

Mission

Our mission is to simplify the process of investing in property and guide you step by step to make the most out of your investment journey.

Vision

Our vision is to help 1000 Australians reach financial freedom through smart property investment. Investors also play a big role in delivering affordable rental housing to the market, we are proud to play a role in the continuation of this.

Our services

Buyers Agency

As a buyers agency we work for you, the buyer. Using a data driven approach, in-house research, and established relationships with agents. We source properties that suit your criteria and we assist with contracts, negotiation, and inspections, right through to settlement.



Data driven research



Access to off market deals



Negotiating deals



Focus on yield & capital growth



Market updates

Finance & Mortgage Broking

Our dedicated finance team offers full support and guidance on your investing journey. We assist in structuring your loans to suit your investment objectives ensuring you choose the correct loan that suits you and your goals.



Access to a wide range of lenders



Investment strategy focused



Full support and guidance



Assistance with settlement



yearly reviews & optimisation

The process



Discovery & Strategy

The first step is your complimentary discovery session where we discuss your goals & help you create a property roadmap.

Finance & Structuring



The next step. Our finance broker and accounting partner will work on the best structure and lending solution for your needs.



Purchase & Settlement

Our team will source a property that meets your criteria and assist you in the purchase, right through to settlement.

Review portfolio summary



We will review and update your actual expenses & plug them into your portfolio budget tool. This will capture your ongoing and anticipated costs for your portfolio.

Australian property market



Challenge

In the fast moving market we are in, many buyers & experienced investors face various challenges in securing the right property for the right price.

Low stock levels



The Perth market in particular is facing record low levels of stock available due to high demand.

Competitive Market



Strong demand from buyers, combined with low levels of supply is fueling a competitive market & price growth.

Increase in migration



A strong population increase has put further pressure on the demand for houses.

Opportunities

Using data to pinpoint suburbs with high capital growth potential & utilising the experience of a buyers agent will give you the opportunity to secure high demand, A grade investment properties to help you build your portfolio whilst also creating much needed affordable accommodation for the rental market.

Outcome

With strong demand, low levels of supply, and an increasing need for rentals this presents a great opportunity for investors to secure high performing properties to further the growth of their property portfolio.

Your team



As an investor, you have full access to our team consisting of the research department, buyers agency, finance & mortgage broking team, client management and support, as well as our partners who can assist with tax & accounting, quantity surveying, settlement and more.

-  **Research Department**
-  **Buyers Agency**
-  **Mortgage Broking Team**
-  **Client Management Team**
-  **Partners - Accountant, Settlement agent, Property manager, Quantity surveyors.**

Property Roadmap[©]



Navigating Your Roadmap

Your roadmap provides a detailed outline of your property investing plan from start to finish, the roadmap is based on your blueprint session and investment goals.



Financial Freedom Details

This is a summary of your passive income goals, target date to reach passive income goal, and the estimated passive income generated from your portfolio.



Strategy Summary

This part of the roadmap summarises the key figures you need to know including your initial deposit, total number of properties, debt and equity levels at different stages as well as other key figures to take into consideration.



Accumulation Phase

Each investment journey entails acquiring properties in your accumulation phase. Each new property purchased uses equity from the portfolio, as the portfolio grows so does the available equity, opening further opportunities to purchase new properties.



Consolidation Phase

When your portfolio reaches a certain value, in order to achieve a lower LVR and pay down debt, you will need to sell some of the properties. The remaining properties will then generate cashflow to help you reach your passive income goal.



Conclusion

Your detailed plan maps a strategic path to financial freedom through real estate investment. The next stage from here is to secure the right properties that will work with your roadmap and allow you to achieve your passive income goals.

The roadmap is designed to be used as a guide to show you the bigger picture of what is achievable over time.

What happens next



- 1 Finance & structure**
 - Our team will work with you to start the finance process & guide you on the right structure for your needs.
- 2 Property search**
 - We start looking for the property that suits your requirements.
- 3 Offer & acceptance O&A**
 - Our buyers agents will negotiate with other agents and property owners to secure the best deal on your behalf.
- 4 Inspections & settlement**
 - We can assist in inspections, obtaining building reports and liaise with your settlement agent to finalise the purchase.
- 5 Property management**
 - We refer you to a local property manager to manage your property & tenants.
- 6 Review**
 - We review & update your portfolio summary with relevant details from your new purchase.

Timeline summary

 **Week 1-3**



Finance & Strategy

 **Week 3-7**



Property Acquisition

 **Week 7-11**



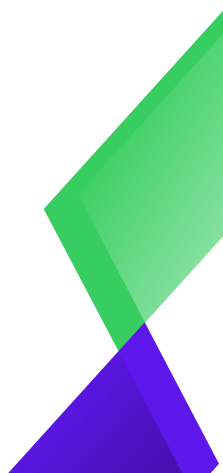
Settlement & Tenants

 **Week 11-12**



Review

This is an estimated timeline and is subject to changes based on specific circumstances and market conditions. It's important to remember we don't want to rush the purchase, our objective is to help you secure the RIGHT property, depending on market conditions and other factors, this may take longer than anticipated.





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Important information



Dynamic Wealth is a member of PICA. (Property Investors Council of Australia.)
Dynamic Wealth Group PTY LTD provides education on Real Estate, Finance & Property Investing.



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