

# WEALTH SUITE



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# OVERVIEW

Wealth Suite is a powerful and comprehensive online learning, analysis, planning and forecasting resource developed in association with Gilligan Rowe & Associates for our clients. It allows you to access our extensive knowledge from the comfort of your home, at a fraction of the cost incurred if you were to spend the equivalent amount of time with us in person.



There are four key Wealth Suite components:

-  WEALTH TRACKER
-  WEALTH FORECASTER
-  PROPERTY ANALYST
-  RESOURCES

With many hours of video and extensive written information and resources, access to Wealth Suite offers our clients a potent and dynamic educational and analytical resource.

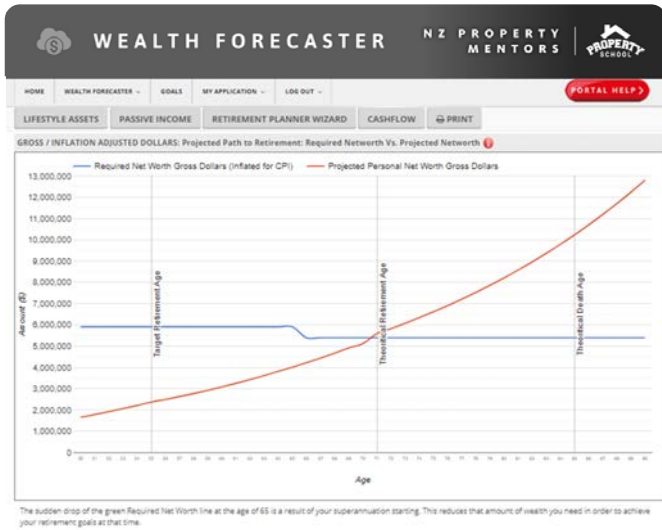
# WEALTH TRACKER

WEALTH TRACKER									
NZ PROPERTY MENTORS									
PROPERTY SCHOOL									
HOME ASSETS & LIABILITIES CASHFLOW SETUP WIZARD HELP & FREE RESOURCES MY APPLICATION LOG OUT PORTAL HELP									
+ADD ASSETS & LIABILITIES EXPORT TO EXCEL PRINT									
All Assets Property Business Other Financial Assets Superannuation/RetSaver Chattel SOP History									
Real Estate Property List   Property Dashboard									
Address	Year Purchased	Current Owner	Type	Purchase Price	Market Value	Debt	Equity	View	
10 Chapman Road, Te Aroha, Waikato	2019	Blagg LTC	Residential Inv	485,000	765,000	285,000	500,000	View	
21 Ouyen Street, Pukekohe	2019	Joseph Jessy Blagg(Blagg)	Residential Home/Bach	250,000	530,000	250,000	280,000	View	
22 Sutherland Drive, Manurewa	2019	Blagg LTC	Residential Inv	350,000	480,000	350,000	130,000	View	
Total				1,065,000	1,775,000	865,000	910,000		
Business List   Business Dashboard									
Name	Year Purchased	Current Owner	Type	Purchase Price	Market Value	Debt	Equity	View	
Shores One Holdings Limited	2017	Joseph Jessy Blagg(Blagg)	Business	10,000	136,000	0	136,000	View	

Track your assets, liabilities, and statement of position. Analyse individual properties as well as a total property portfolio and other asset classes.







Track your financial goals and targets using the analysis and projection tool. Model your future financial outcomes and ‘what if’ scenarios.

This section of the suite allows you to set your retirement goals and identify the ‘gap’ between your current situation and your desired retirement lifestyle. The gap can be eliminated in a number of ways.

Wealth Forecaster allows you to identify the actions you need to take to achieve your goals and model their effectiveness at closing the ‘gap’ and building wealth.

### Wealth Planning Pack

This pack provides access to Wealth Tracker, Wealth Forecaster and Goal Planning. Pricing is:

- \$500 + GST per annum
- \$375 + GST per annum for GRA clients (25% off)

Rental Yield Analysis (Net Operating Income) - Buy to Let			
Rent weekly	380		
<b>Rent Annual 50 Weeks</b>	<b>19,000</b>		
Gross Yield %			8.0 %
Insurance	1,500		
Management Fees			0 %
Rates	3,500		
Repairs & Maintenance	1,000		
<b>Total Opex / MOE</b>	<b>6,000</b>		2.8 %
<b>Net Yield / Net Yield %</b>	<b>13,000</b>	<b>13,000</b>	<b>5.5 %</b>
Interest on 100% Cost Incl Reno at 3.5%	8,330		
Interest on 70% LVR at 3.5%	-	5,831	
<b>Net Operating Income (NOI)</b>	<b>4,670</b>	<b>7,169</b>	
<b>LVR</b>		NOI at 100% LVR	NOI at 70% LVR
Cashflow outcome	Surplus		Surplus
NOI / Cost at stated LVR	1.96 %		3.01 %

- **Model prospective property investments and upload your due diligence research**
- **Share your findings with your advisers**
- **Migrate a prospective property into Wealth Tracker and Wealth Forecaster at the click of a button.**

### Property Analyst Pack

This pack provides access to Property Analyst’s calculators and collaboration tool. Pricing is:

- \$500 + GST per annum
- \$375 + GST per annum for GRA clients (25% off)







Useful articles, videos and quizzes to further your education and assist with your property investing. Topics covered include:

- **taxation**
- **asset protection**
- **finance**
- **property strategies**
- **market information**
- **due diligence**
- **and much more...**

### Resources Pack

This pack gives access to the educational content in the Resources section. It provides many hours of valuable content and learning opportunities. Pricing:

- **\$1,500 + GST per annum**
- **\$1,125 + GST per annum for GRA clients (25% off)**

### Comprehensive Combination Pack

Access all three areas of Wealth Suite by combining the Wealth Planning, Property Analyst and Resource packs. We offer a great discount:

- **\$2,000 + GST per annum (20% discount)**
- **\$1,405 + GST per annum for GRA clients (25% off)**

Boost your analysis with high quality data inputs from RPNZ and Property Guru by CoreLogic. We have negotiated a bundle package at considerable discount, allowing our clients to access CoreLogic data to facilitate robust investment decisions.

- **\$1,500 + GST per annum**
- **\$1,200 + GST per annum for GRA clients (20% off)**



- **RPNZ is the online property intelligence tool used by property professionals throughout New Zealand**
- **CoreLogic property data and analytics delivers insight packaged in a smart, fast and easy to use tool**



- **Property Guru is a serious solution for property professionals and provides detailed property market and sales information.**



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