

Expat Property Wealth Worksheet

Personal Snapshot

Full name

Age

Current city/country

Citizenship(s)

Household & Income

Household status

☐

Single

☐

Partnered

☐

Married

Children

☐

No

☐

Yes

→ Number

Ages

Annual household income (AUD)

☐

Under \$200k

☐

\$200k–\$300k

☐

\$300k–\$400k

☐

\$400k+

Your Expat Return Window

When do you expect to return to Australia?

☐ Within 2 years

☐ 2–5 years

☐ 5+ years

☐ Unsure

WORST CASE SCENARIO

If you didn't plan at all and just 'dealt with it later', what's your worst-case scenario when you return?

Current Australian Property Holdings

Do you currently own Australian property?

☐ No

☐ Yes: 1 property

☐ Yes: 2–3 properties

☐ Yes: 4+ properties

Current Property Portfolio Snapshot

Location/Suburb	Approx. Value	Loan Balance	Ownership Structure (eg: personal, joint, trust, company)

Target Future State (5–10 Years)

List 1–3 target suburbs or school zones that matter to you

1

2

3

In 5–10 years, ideally

☐

Home base only

☐

Home + 1 investment

☐

Home + Multiple properties (3+)

☐

Multiple investment properties (3+)

Financial Confidence Self-Rating (Rate yourself from 1 to 5, with 1 being least confident, and 5 most confident)

How well do you understand your current and future borrowing power ?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

How would you rate your understanding of ownership structures and it's implications ?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

How confident are you in your ability to execute your plan?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5



Currently Relying On (Check all that apply)

☐

Bank

☐

Local broker

☐

Expat specialist

☐

Accountant

☐

Friends / forums

☐

Nobody yet



Top 3 Questions For Your Strategy Call

What are your top 3 biggest concerns or questions that you would like answered?

1

2

3

⚠ Don't Lose Your Results.

Save a copy before proceeding ahead.

Save PDF

Apply For An Expat Property Wealth Assessment Call

We'll review this together and map your smartest next step — before anything gets locked in.

Apply for an Assessment Call