



Getting Market Ready Checklist




Instructions:

- ✔ Use this checklist to keep you accountable in the process of getting market ready.
- ✔ Tick off items as you are doing them and once done!!
- ✔ Refer to Module 1 for a detailed explanation on each item.

Checklist

	Doing	Done
✔ Review Existing Structures		
• Principal Place of Residence (PPR)	<input type="checkbox"/>	<input type="checkbox"/>
• Investment Properties	<input type="checkbox"/>	<input type="checkbox"/>
• Businesses etc.	<input type="checkbox"/>	<input type="checkbox"/>
• Create Flowchart of Existing Interrelated Structures	<input type="checkbox"/>	<input type="checkbox"/>
✔ Set Up New Structure/s	<input type="checkbox"/>	<input type="checkbox"/>
✔ Review/Setup Personal Insurances		
• Income Protection	<input type="checkbox"/>	<input type="checkbox"/>
• Life	<input type="checkbox"/>	<input type="checkbox"/>
• Trauma	<input type="checkbox"/>	<input type="checkbox"/>
• Total and Permanent Disability	<input type="checkbox"/>	<input type="checkbox"/>
✔ Review/Setup Asset Insurances		
• Building	<input type="checkbox"/>	<input type="checkbox"/>
• Contents	<input type="checkbox"/>	<input type="checkbox"/>
• Public Liability	<input type="checkbox"/>	<input type="checkbox"/>
• Home Worker’s Compensation	<input type="checkbox"/>	<input type="checkbox"/>
• Landlord	<input type="checkbox"/>	<input type="checkbox"/>
• Auto	<input type="checkbox"/>	<input type="checkbox"/>
• Business or Key Person	<input type="checkbox"/>	<input type="checkbox"/>
• Pet etc.	<input type="checkbox"/>	<input type="checkbox"/>
✔ Review Existing Property		
• Review Current Market Values	<input type="checkbox"/>	<input type="checkbox"/>
• Review Current Rental Rate	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Current Rental Statements	<input type="checkbox"/>	<input type="checkbox"/>

	Doing	Done
• Compile Current Loan Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Current Lease Agreements	<input type="checkbox"/>	<input type="checkbox"/>
• Review Loan Documents re: Security Property for Each Loan – Determine if Cross Securitised	<input type="checkbox"/>	<input type="checkbox"/>
• Review Loans re: Terms, Rates etc.	<input type="checkbox"/>	<input type="checkbox"/>
 Review Portfolio		
• Complete Property Analysis (Module 1 Appendix)	<input type="checkbox"/>	<input type="checkbox"/>
• Identify Property/s Holding You Back, Review Benefit of Selling, Review Saleability	<input type="checkbox"/>	<input type="checkbox"/>
• Confirm Properties are Rented at Market Rent	<input type="checkbox"/>	<input type="checkbox"/>
• Consider if Properties can be Legally Rented at Dual Occupancy or Rent By Room	<input type="checkbox"/>	<input type="checkbox"/>
• Consider if You Can Add Services to Increase Rent (Pay TV, Pool, Garden Maintenance, Furnished etc.)	<input type="checkbox"/>	<input type="checkbox"/>
• Review Merit of Renovating for Rental and Value Increase	<input type="checkbox"/>	<input type="checkbox"/>
• Review Manufactured Growth Opportunity (e.g. Multi dwelling, Strata title, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
 Review Finances		
• Compile and Review Current Personal Loan Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Credit Card/Store Card Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Private Loan Information	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Car Loan Statements/Leases/Hire Purchase	<input type="checkbox"/>	<input type="checkbox"/>
• Compile and Review Last Two Years Tax Returns – Individuals and Structures	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Evidence of Income (Pay Slips, Tax Returns if Self Employed, Share Dividend Statements)	<input type="checkbox"/>	<input type="checkbox"/>
• Compile Bank Statements of Term Deposits/Savings	<input type="checkbox"/>	<input type="checkbox"/>
• Review Other Significant Assets – Current Market Value, Adequately Insured, Saleability	<input type="checkbox"/>	<input type="checkbox"/>
• Review Superannuation Policies – Compile Last Two Years Statements	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Determine Asset and Liability Position	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Determine Borrowing Capacity	<input type="checkbox"/>	<input type="checkbox"/>

	Doing	Done
• Review/Determine Loan Servicing	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Determine Available Equity/Cash	<input type="checkbox"/>	<input type="checkbox"/>
 Review/Set Up Wills		
• Locate and Review Existing Will	<input type="checkbox"/>	<input type="checkbox"/>
• Update Will if Over 5 Years Old	<input type="checkbox"/>	<input type="checkbox"/>
• Update Will if Your Circumstances Have Changed (Name Change, Children, Death, Divorce, New Property/s, New Structures	<input type="checkbox"/>	<input type="checkbox"/>
• Review if Tax Effective	<input type="checkbox"/>	<input type="checkbox"/>
• Retain Copy with Solicitor and You	<input type="checkbox"/>	<input type="checkbox"/>
 Review/Set Up Estate Planning		
• Review/Set Up Enduring Power of Attorney – Long Term Incapacities	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Consider Set Up Temporary Power of Attorney – Short Term Incapacities	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Consider Set Up Health Directive	<input type="checkbox"/>	<input type="checkbox"/>
• Review/Consider Organ Donation Directive – Make Known to Others	<input type="checkbox"/>	<input type="checkbox"/>
• Consider if You Wanted to be Buried or Cremated and What Done With Ashes	<input type="checkbox"/>	<input type="checkbox"/>
 Review Personal Management		
• Declutter/Organise Home and Office Space	<input type="checkbox"/>	<input type="checkbox"/>
• Review Time Management (Time Tracker – Module 1 Appendix),	<input type="checkbox"/>	<input type="checkbox"/>
• Start Using Diary	<input type="checkbox"/>	<input type="checkbox"/>
• Start Take Notes (Every Phone Call, Meeting, Great Ideas)	<input type="checkbox"/>	<input type="checkbox"/>
• Start Make Lists	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Daily Task Lists	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Weekly Task Lists (Template Summary Folder)	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Monthly Task Lists (Template Summary Folder)	<input type="checkbox"/>	<input type="checkbox"/>
• Update Skills (Computer, Excel, Bookkeeping)	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Seven Daily Rituals	<input type="checkbox"/>	<input type="checkbox"/>

