



option



Secure Your Financial Future



Investing for Success



Become A Property Investor

# Introduction

## How we help you

Secure Your Financial Future: At Option, we are dedicated to empowering individuals like you on their unique financial journeys.

Investing for Success. We believe that success is not just a destination; it's a journey. It requires careful planning, informed decisions, and smart investments.

Become A Property Investor. Property investment can be a powerful wealth-building strategy, but it's essential to be tax-effective and future-oriented.

Is property investments aligned with your long-term financial goals?





**With us, your financial  
aspirations are within reach**

# Tailored Strategies

We'll explain how you invest, and show you the great results you can achieve. Let's explore our way to financial success

## *Who are we?*

### Your Wealth, Our Commitment

Located at 1 Castlereagh Street in Sydney, Option Wealth are your partners in achieving your financial goals. With a dedicated team of experts we are here for your success.

We're committed to helping you find practical solutions for reducing your mortgage, saving on tax, and tackling those retirement concerns head-on, with straightforward, practical advice.

## *What we do*

### Grow Your Wealth Like A Pro

Our mission is simple: to help you build and protect your wealth.

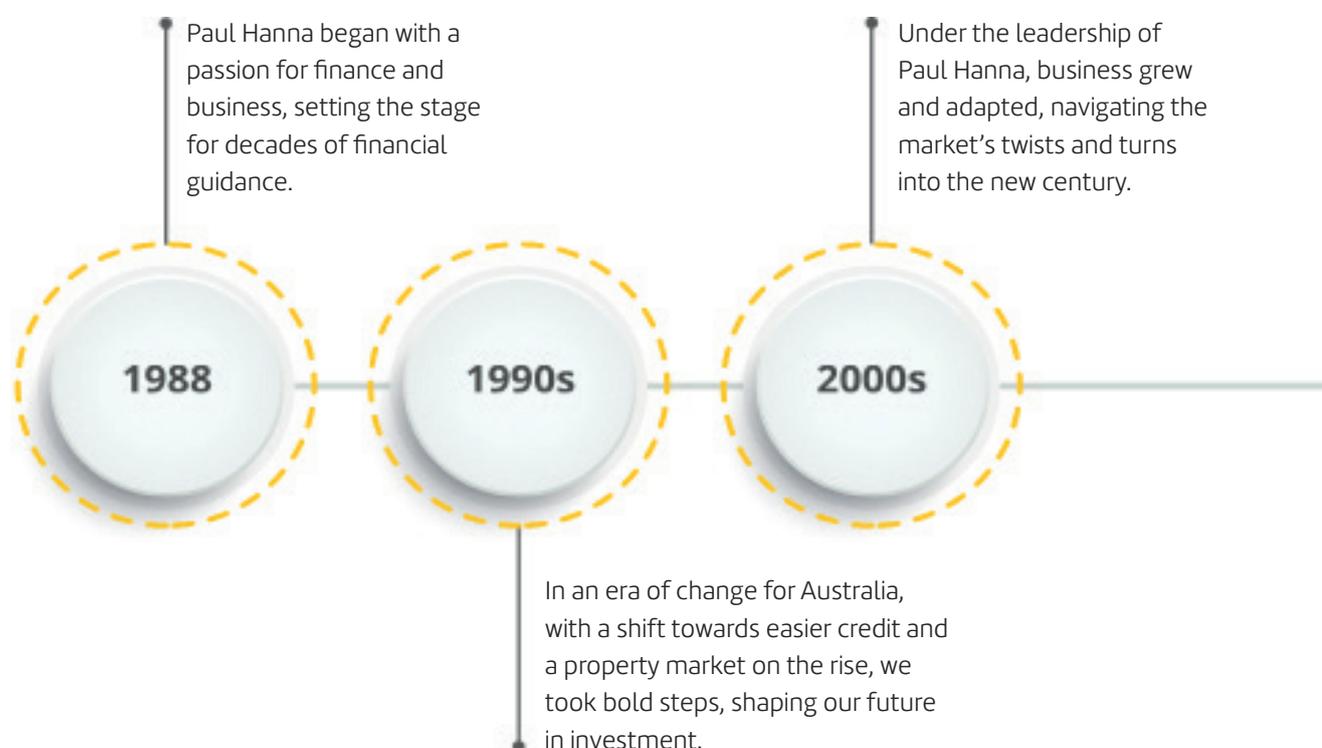
We provide comprehensive financial planning, investment strategies, and property insights. Whether you're looking to grow your assets, secure your future, or become a savvy property investor, we have the knowledge, tools, and experience to guide you every step of the way.



# A little bit about **Our story so far**

In 1988, CEO Paul Hanna set out on his finance and investment journey, driven by a keen business sense and a dedication to finance and wealth creation for everyday Australians.

His dedication over 35 years has been to empower individuals in their financial goals.





**890**

Happy clients  
over time



**630+**

Properties  
Invested



**26**

Awards for  
Sustained  
activity

With Option's launch in 2016, we sharpened our focus, leveraging market trends to drive high growth in property investments for our clients.

**2010s**

**2020s**

**2024+**

We're steady and growing, navigating the property and finance landscape with a clear vision for the future.

With years of experience behind us, we're committed to staying at the forefront of the property and finance sectors.





*How we do it*

# Property Investment

## → Demographic Data Assessment

We begin by researching and creating analysis of demographic data. Research covers population growth, age and income distribution, and employment opportunities in the chosen area. Demographic or 'People' data serves as our indicator, helping us understand the potential tenant or buyer base.

## → Migration Patterns

We delve into migration patterns and market dynamics, examining whether people are moving into or out of the area and the reasons behind these trends. This information helps us anticipate changes in property demand and identify investment opportunities.

## → Market Competition and Pricing

We also consider market competition and pricing. Understanding the local real estate market's competitive landscape and pricing trends is essential for making informed investment decisions. By combining demographic insights with market conditions, we aim to maximise the potential for successful investments.



# Our Process

01

## Evaluation and Analysis

Begin with a thorough evaluation and analysis of your current financial position.

02

## Strategic Planning

Develop a strategic plan for property and wealth-building, including an assessment of your overall financial health.

03

## Tailored Financial Strategy

Create customised financial strategies and structures to support your goals, including cash flow planning.

04

## Secure Property Financing

Secure finance with our in-house finance team from a range of different lenders.



# Your Path to Prosperity, Investing for Success

05

## Property Aquisitions

Meticulously select suitable properties aligned with your specific financial situation or circumstance.

06

## Contract Management and Settlement

Proficiently handle contracts and ensure smooth property settlement.

07

## Tenant and Property Management

We manage property inspections, tenant matters, and overall property care.

08

## Portfolio and Client Support

Continuously review our portfolio and provide comprehensive client support and concierge-level care.



# Client Case Studies

*We explain challenges to Property Investment*



## The Challenge

Many Australian families face hurdles when trying to invest in property.

They often struggle to get affordable loan rates, or save up enough for a down payment, and navigate the complicated loan approval process.

Understanding property market rules, like who can invest and tax rules, can be confusing too.



## The Solution

We help families find the best loan rates, so they can afford to invest. We also assist with planning and simplify the loan approval process.

Next, we delve into impressive growth that some of our clients have obtained in the last few years by following the Option plan.

# Case Studies

## Investment Properties



*Growth Value: \$230,600*

Ormeau QLD (House & Land) 4bed/2bath/2car  
Purchase Price: \$514,400 (2019)  
Current Value: \$745,000 (2024)



*Growth Value: \$192,600*

Spring Mountain QLD (House & Land) 4bed/2bath/2car  
Purchase Price: \$542,500 (2020)  
Current Value: \$735,000 (2023)



*Growth Value: \$261,600*

Hope Island QLD (Apartment) 2bed/2bath/1car  
Purchase Price: \$499,000 (2021)  
Current Value: \$760,000 (2023)



# Case Studies

## Investment Properties



*Growth Value: \$342,600*

Thornlands QLD (House & Land) 4bed/2bath/2car  
Purchase Price: \$583,000 (2017)  
Current Price: \$925,000 (2023)



*Growth Value: \$280,600*

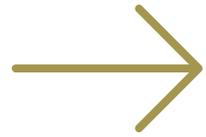
Warnervale NSW (House & Land) 4bed/2bath/2car  
Purchase Price: \$593,100 (2020)  
Current Value: \$855,000 (2023)



*Growth Value: \$283,600*

Redland Bay QLD (House & Land) 4bed/2bath/2car  
Purchase Price: \$522,000 (2017)  
Current Value: \$805,000 (2023)





**At Option, we're dedicated to your financial success.**

**Consider the Ben and Sarah, who saved \$55,000 in interest by refinancing their mortgage with our guidance.**

**They also invested in two income-generating properties, securing their future.**



# They chose us

## Ben and Sarah, Sydney



With guidance from Option Wealth, we've taken control of our finances by reducing our mortgage repayments, saving us over \$55K in interest, and enabling us to purchase a high-growth investment property.

"It's given us a real peace of mind."



## Roger and Susan, Wollongong



"The team at Option Wealth helped us create a plan to pay off our home loan before retirement and invest in property to grow our wealth."

"We are now in comfortable semi retirement."



The individuals featured are genuine customers of ours. For privacy reasons, the photographs provided are for illustrative purposes only.



option



## Bill and Linda's Story

Meet the Johnson family, transforming their financial future through the expert guidance of Raphael Bove and the Option team.

Bill and Linda, with an eye on a comfortable retirement, have invested in carefully selected property for several years, closely following Raphael's strategic advice.

The turning point for Bill and Linda was their decision to transfer these investments to their children. This is not merely a transfer of wealth; it is a significant gift made possible by Raphael's expertise, providing their children with a solid financial foundation.

It's not just about financial success; it's about creating a lasting legacy that benefits future generations, thanks to the assistance of the Option team.

We take great pride in contributing to life-changing decisions, understanding that our guidance significantly impacts their retirement and their families' financial security.

*The Option team*



# Our People

## Meet the Option Team



**Paul Hanna**

Chief Executive Officer



**Raphael Bove**

General Manager



**Jacqui Hanna**

Chief Relationship  
Manager



**Sam Hanna**

Operations  
Manager



**Michael Gee**

Head of Finance



**Cassandra Hanna**

Group Relationship  
Manager



**Ryan Annelsey**

Strategy and Marketing



**Zoe O'Donnell**

Marketing Manager



**Kevin Keane**

Client Consultant



**Martin Fiay**

Client Consultant



**Stephanie Cook**

Property Manager





Imagine where you could be tomorrow if you take the leap today

Scan the QR code and learn more about your journey with Option.

*Your Option for a better future*





# Contact

Suite 1802, Level 18  
1 Castlereagh Street Sydney NSW 2000  
P: 1300 848 848  
[info@option.com.au](mailto:info@option.com.au)  
[www.optionwealth.com.au](http://www.optionwealth.com.au)

