Your Wealth, Our Expertise:

Investing for Success

Content

Introduction

How we help you

- Investing for Success
- Secure Your Financial Future
- Become A Smarter Property Investor

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. Are your property investments aligned with your long-term financial goals?

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

With us, your financial aspirations are within reach

Who we are

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 committed to your success. We bring clarity, strategy, and innovation to your financial future.

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, our CEO Paul Hanna embarked on his investment path, channeling his passion for finance and keen business acumen. With over 35 years of commitment to continually empower individuals to achieve their financial goals.

1988

Initially starting in property developments before turning to assist clients like you

Navigating Growth

Early growth and expansion, pioneering progress in the 2000's

Meeting Demands

In the 2010's, Option Wealth adapted to changing demographics and the increasing housing demand fueled by population growth

Sustained Progress

Thriving in a dynamic market and captilaisng on opprtunities in the 2020's

2023 +

Recent achievements and ongoing commitment as housing and finance are again in the spolight

Lets Talk

The Numbers

890

Happy clients over time

630+

Properties invested

26

Awards for our sustained activity

“Building Wealth, One Case at a Time”

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 foundational 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

Section 1: Planning and Strategy

01 → 02 → 03 →

01. Evaluation & 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.

Your Path to Prosperity: Investing for Success

Our Process

Step 2: Execution and Management

04 → 05 → 06 → 07 → 08

04. Secure Property Financing

Secure finance with our expert in house team from a library of lenders.

05. Property Acquisitions

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

06. Contract Management & Settlements

Proficiently handle contracts and ensure smooth property settlements.

07. Tenant Management & Property Care

Manage property inspections, tenant matters, and overall property care.

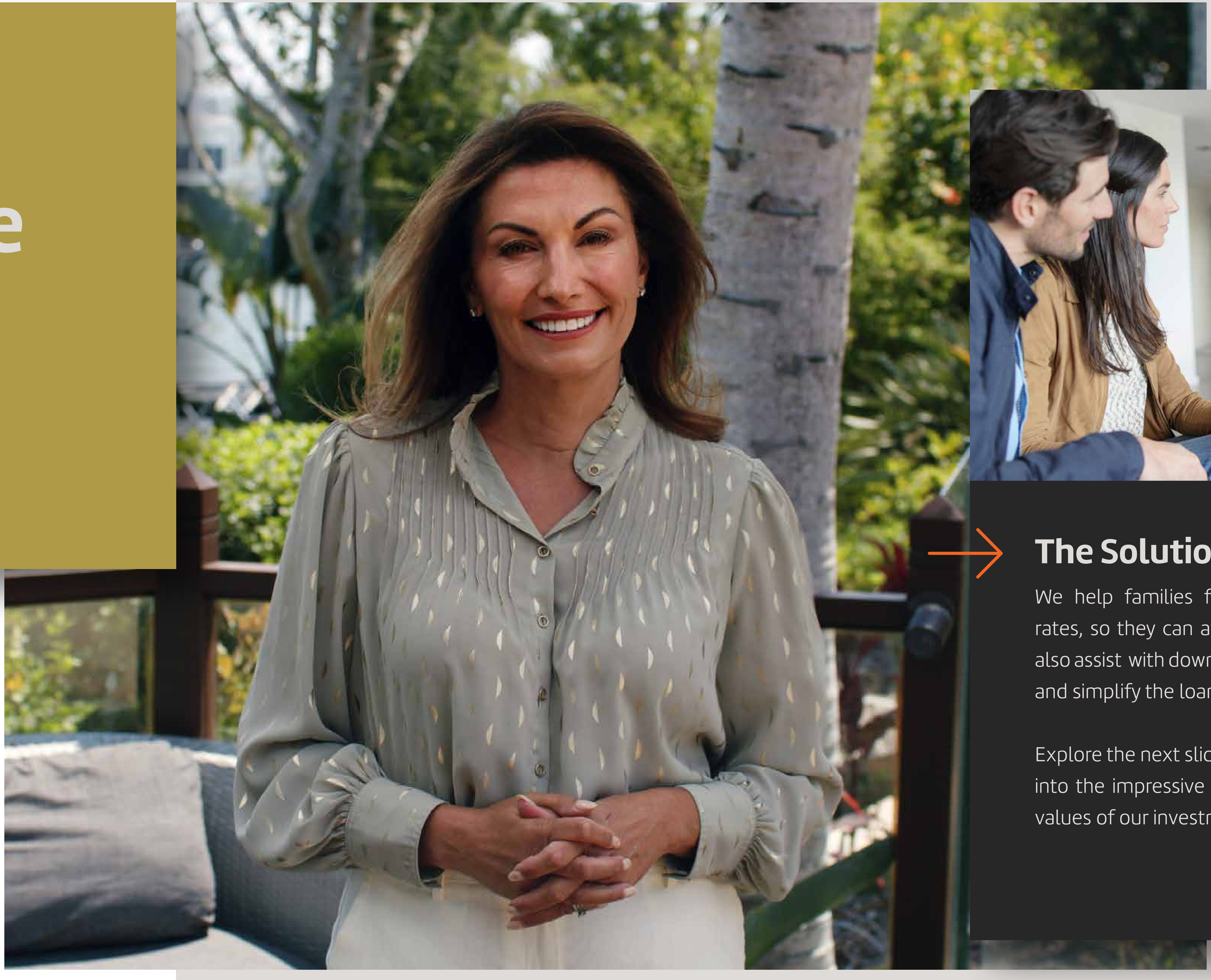
08. Portfolio Analysis & Client Support

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

Success Unveiled

Client Case Studies

We explain challenges to Property Investment



The Problems

Many Australian families face hurdles when trying to invest in property. They often struggle to get affordable loan rates, 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 down payment planning and simplify the loan approval process.

Explore the next slides, where we delve into the impressive growth in property values of our investment properties.

Case Studies

Investment Properties

Growth Value: $230,600

Ormeau QLD (House & Land) 4bed/2bath/2car
Purchase Price: $514,400 (2019)
wurrent Value: $745,000 (2023)

Growth Value: $360,600

Orange NSW (House & Land) 4bed/2bath/2car
Purchase Price: $469,400 (2019)
Current Value: $830,000 (2023)

Growth Value: $261,000

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

Case Studies

Investment Properties

Growth Value: $192,500

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

Growth Value: $303,000

Redland Bay QLD (House & Land) 4bed/2bath/2car
Purchase Price: $522,000 (2017)
Current Value: $825,000 (2023)

Growth Value: $342,000

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

Case Studies

Investment Properties

Growth Value: $261,900

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

Growth Value: $254,000

Baringa QLD (House & Land) 4bed/2bath/2car
Purchase Price: $599,000 (2019)
Current Value: $853,000 (2023)

This could be you.

Ben and Sarah, Sydney

"With Option Wealth's guidance, we've taken control of our finances by refinancing our mortgage to save $55K in interest and purchasing two high growth properties. It's given us a real peace of mind."

They chose us

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

Roger and Susan, Melbourne

"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."

Bill and Linda’s Story

Meet the Johnson family, transforming their financial future with the expert guidance of Raphael Bove and the Option Wealth team. Bill and Linda, with an eye on a comfortable retirement, have been investing in carefully chosen properties over ten years, closely following Raphael’s strategic advice.

The turning point for Bill and Linda was their decision to pass these investments to their children. This isn’t just a wealth transfer; it’s a significant gift facilitated by Raphael’s expertise, providing their children with a robust financial foundation.

Watching their children seize these opportunities brings immense satisfaction to Bill and Linda. It’s a testament to the transformative power of Option Wealth’s guidance. It’s not solely about financial success; it’s about creating a lasting legacy benefiting generations, thanks to the assistance of the Option Wealth team.

At Option Wealth, we take great pride in playing a role in life-changing decisions, understanding that our guidance shapes portfolios that stand the test of time.

Amazing professionals

Our People

- Driven by a genuine passion to serve.

- Our team is dedicated to understanding and aiding your needs.

- It’s not just business, it’s about helping YOU.

Raphael Bove
General Manager

Provides recommendations
- Strategic Analysis
- Driving Growth through Informed Strategies.
- Tailored Wealth guidance

Michael Gee
Head of Finance

Manager, Broker Division
- In-House Finance Expert
- Brokerage Specialist
- 10+ Years of Dedication
- Shaping Financial Excellence

Cassandra Hanna
Group Relationship Manager

- Expert in property management
- Adept at crafting tailored loan solutions
- Oversees and nurtures customer relationships

Contact

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