



TAILORED
PROPERTY VENTURES

CLIENT ONBOARDING GUIDE





Welcome

Welcome, prospective clients! We are thrilled to introduce you to our onboarding guide. This guide will give you a breakdown of our services and help you understand the steps for onboarding as one of our clients.

First, we want to thank you for choosing Tailored Property Ventures Ltd. We know that choosing the right provider can be tough. Which is why we are committed to making your experience with us as positive and prosperous as possible.

We designed our onboarding process to get to know you and your needs. This way, we can give you the best solutions and investments. We will work with you to understand your goals, preferences, and expectations. This will help us create a personal investment strategy that meets your specific criteria.

Once onboard, we will provide regular updates every step of the way, ensuring you are up to date and supported as you build your property portfolio. We are committed to providing you with exceptional service and guidance throughout the entire process.

Thank you again for considering our services. We look forward to working with you and helping you achieve your property investment goals. If you have any questions or concerns, please do not hesitate to reach out to us.



About Us

At Tailored Property Ventures, we specialise in sourcing property investment opportunities for individuals who may be unfamiliar with property investment or lack the time to manage the investment process themselves. Each client receives a bespoke investment strategy to suit their needs and goals built around one of our 3 core services:

1. Buy to Let Property Portfolio Building

We support you to build your portfolio through sourcing opportunities, managing the purchase and refurbishment process, and tenanted the properties via our partnered letting agents. This service is designed for generating steady rental income and long-term capital growth.

2. Property Flipping and Refurb Project Management

For those looking for quicker financial gains, our property flipping service offers a partnership model where we manage the entire flip process, from purchase to sale, maximising returns through renovations and market timing. This service is particularly tailored for investors who wish to see a rapid return on investment, providing you with a hands-off approach. We handle all aspects, from sourcing undervalued properties to managing extensive renovations and navigating the sales process.

3. Luxury Apartment Developments

Invest in high-end apartment developments without the complexities of direct management. We have partnered with a leading investment firm to bring you exclusive opportunities, promising attractive returns with minimal involvement. Our luxury development service offers you a chance to participate in high-value property markets with the ease of a managed investment.

During the initial onboarding, we work closely with our clients to develop a communication plan that accommodates their schedules. Whether you need assistance or have questions, we are always available to provide support and guidance.

Join us on this journey to property investment success. Let Tailored Property Ventures Ltd be your trusted partner every step of the way.



Building Your Property Portfolio

When it comes to building your own property portfolio, we offer three main investment strategies, each designed to meet different financial goals and investment styles. Whether you prefer to focus on one strategy or combine several for diversified benefits, we're here to develop a personalised plan that aligns with your vision. The three main strategies are:

Monthly Cashflow

This strategy is ideal for investors looking to generate steady, reliable income from their properties. It focuses on acquiring real estate in high-demand rental markets to maximize monthly returns, providing a consistent cash flow that can supplement or even replace traditional income sources.

Annual Investment Return

Geared towards those seeking robust annual returns, this approach involves selecting properties that promise a high yield over the calendar year. It's particularly suited to investors looking to outperform traditional savings and investment vehicles like bonds and savings accounts.

Capital Appreciation

This strategy targets long-term growth, ideal for investors who are in it for the horizon. By investing in emerging markets or properties with strong potential for appreciation, this approach aims to multiply your initial investment, yielding significant returns upon eventual sale or refinancing.

During the onboarding process, including your initial Discovery Call, we'll delve into these strategies in more detail to understand which align best with your investment goals. Our conversation will help us determine the specific criteria for your property selections and lay the groundwork for a bespoke investment plan tailored just for you.

With your objectives clearly defined, we'll kickstart our comprehensive 5-step process to build and grow your property portfolio, ensuring each step is aligned with the established investment criteria and your overall financial goals.



Building Your Property Portfolio

1 Property Sourcing

We'll employ various marketing techniques and leverage our extensive network to search for properties that meet your criteria. Once identified, we'll compile our detailed Property Pack. This provides a comprehensive breakdown of essential metrics including:

- Current market value
- Purchase price
- Refurbishment costs
- End market value
- Refinance options
- Remaining invested capital
- Monthly cashflow projections
- Rental breakdown
- Estimated time frame for capital recapture.

This thorough analysis ensures transparency and empowers you to make well-informed decisions regarding your investment.

NOTE: Although our Property Packs will contain helpful and accurate information of the property, financial details, and local statistics for your assistance, we urge you to review the details and make your own decision to proceed. We cannot offer any investment or financial advice, which is a strictly regulated area.

2 Property Completion

Following confirmation to proceed with the investment, we will connect you with our trusted solicitors and mortgage brokers, as required. These professionals will guide you through the entire process, from initial documentation to the final property purchase.

Rest assured, we prioritise efficiency and diligence in every step, targeting a swift and seamless transfer of ownership.

3 Refurbishment

Once purchased, we'll manage the entire refurb process utilising our trusted builders. We'll develop detailed Statements of Work to ensure the refurbishment specifications align with the property's end goal market expectations.



Building Your Property Portfolio

Throughout the entire refurbishment process, we provide regular updates including video walkthroughs and schedule updates.

Upon completion of the refurbishment, the final payment to the builder is withheld until a thorough inspection has been conducted by Tailored Property Ventures.

4 Refinancing

Following the successful refurbishment of the property, we will initiate discussions with our mortgage broker to explore refinancing options. Our goal is to release as much capital as possible from the investment in line with your investment strategy.

5 Tenancy and Review

The final step in our process is to facilitate onboarding you with our letting agents and initiate the tenancy process. This final step culminates in the successful addition of the property to your portfolio, generating the expected returns in alignment with your goals.

Once the property is occupied, we schedule a follow-up strategy session to evaluate the entire process vis-à-vis your goals and strategy. During this session, we explore any potential adjustments needed and outline the next steps to ensure continued success in your property investment journey.



The Onboarding Process

Our onboarding process is designed to be simple and efficient. Initially, we'll schedule your free 30-minute Discovery Call. During this call, we'll delve into your objectives and aspirations in property investment, explore the available strategies, and outline the services we offer. Together, we'll map out the criteria for your property investments and agree a communication plan tailored to your schedule.

Throughout this process, we'll also guide you through our Investment Criteria Questionnaire, ensuring that every detail aligns with your preferences. Any adjustments or clarifications can be addressed before finalising your criteria.

Following the Discovery Call, we'll provide you with our Terms of Business for your review and signature. Upon receipt of the signed agreement, a non-refundable registration fee of £500 will be due, which will be deducted from your first sourcing fee if applicable. Once this payment is received, we'll conduct the necessary Anti-Money Laundering & KYC checks and formally welcome you onboard as a valued client of Tailored Property Ventures Ltd. If needed, we can also facilitate introductions to our partner accountant to assist you in setting up a limited company, discussing potential tax and investment benefits.

Once onboard, the full sourcing fee will be payable, and upon receipt, we'll initiate our property sourcing process to kickstart the building of your property portfolio.





Thank You

Thank you for considering Tailored Property Ventures Ltd as your partner in property investment success.

We appreciate the opportunity to assist you on your journey towards achieving your investment goals. Our team is committed to providing you with the highest level of service and support every step of the way.

If you have any questions or would like to learn more about how we can help you build and grow your property portfolio, we invite you to book a Discovery Call with us. Let's discuss your objectives and how Tailored Property Ventures Ltd can tailor a solution to meet your needs.

We look forward to the possibility of working with you and helping you on your property investment journey.

Warm regards,



Andrew Graham
Director

Tailored Property Ventures Ltd