



Your Investment Roadmap

Tailored strategies to suit your goals in wealth creation



Welcome to Optio Property

Helping you build wealth through property

We empower Australians to take control of their financial future through strategic, data-driven property investments. With over a decade of experience and access to the full scope of financial and property services, we utilise extensive market analysis to uncover leading opportunities — guiding you every step of the way.

We provide the expertise of a large institution, with the care and flexibility of a boutique service. With a strong foundation in top-tier firms, we saw the system lose its focus on people. That's why we created a better way — offering corporate-level service in a tailored, boutique model that puts your success first.

10+ Years in the Industry

500+ Completed Projects

600+ Satisfied Clients



Your Property Advisor

Grant Bowie — Head of Property & Strategy



Grant Bowie

Head of Property & Strategy

Grant leads the property and strategy division at Optio Property Group. With a strong foundation built in top-tier firms, Grant identified that the industry had lost its focus on people. That insight drove the creation of Optio — a boutique advisory model that delivers corporate-level expertise with genuine, personalised care.

Grant's approach centres on building long-term relationships with clients, understanding their individual circumstances, and crafting strategies that deliver real, measurable results. His deep market knowledge and hands-on involvement at every stage of the investment process ensure nothing is left to chance.

From initial consultation through to settlement and beyond, Grant and his trusted network of alliance partners guide you every step of the way — making the entire property investment journey seamless and stress-free.

Grant's Track Record

Results that speak for themselves.

10+

Years in the Industry

500+

Completed Projects

600+

Satisfied People



The 6-Step Roadmap

Your pathway to strategic property investment

01

Discovery & Consultation

Understand your position, goals & objectives

02

Investment Strategy

Tailored plan with cash flow forecasting

03

Market Analysis & Insights

Data-driven location & market research

04

Buyers Advocacy

Curated opportunities tailored for you

05

Post-Purchase Support

Settlement, leasing & ongoing coordination

06

Portfolio Management

Annual reviews & portfolio optimisation



Steps 1–3: Foundation & Research

Building a solid foundation for your investment journey

01

Discovery & Consultation

- ✓ Comprehensive review of your current financial position and goals
- ✓ Assessment of risk tolerance, investment timeline and cash flow requirements
- ✓ Understanding your short-term and long-term wealth creation objectives
- ✓ Initial consultation with no pressure or obligation

02

Investment Strategy

- ✓ Tailored investment strategy aligned to your unique circumstances
- ✓ Detailed cash flow analysis and performance forecasting
- ✓ Entity structure guidance (personal, trust, SMSF, company)
- ✓ Collaboration with alliance partners across finance, tax, and legal services

03

Market Analysis & Insights

- ✓ Population trends and sociodemographic research
- ✓ Government infrastructure spending and planned developments
- ✓ Historical growth patterns, vacancy rates, and yield data
- ✓ Multi-scenario projection summary for identified markets



Steps 4–6: Execution & Growth

Turning strategy into results with expert guidance

04

Buyers Advocacy

- ✓ Access to exclusive, expertly vetted investment opportunities
- ✓ Rigorous property due diligence including site plans, designs, and builder reputation
- ✓ Expert review ensuring alignment with your objectives
- ✓ Contractual review covering key clauses, terms, and construction timeframes

05

Post-Purchase Support

- ✓ Project management through settlement and leasing
- ✓ Coordination with accounting, legal, finance, and property management
- ✓ Seamless handover to trusted alliance partners for ongoing services
- ✓ Lifetime access to investment evaluations and future opportunity assessments

06

Portfolio Management & Review

- ✓ Ongoing portfolio performance tracking and benchmarking
- ✓ Diversification strategy across multiple market segments
- ✓ Annual rental income review and property valuation assessments
- ✓ Identification of capacity and timing for future investments



01 Discovery & Consultation

Understanding where you are today

Every journey begins with understanding where you are today. We take the time to assess your current financial position by leveraging the comprehensive range of services offered by our alliance partners. There are no pressures or obligations — only the opportunity for a brighter future.

Key Deliverables

- ✓ Comprehensive review of your current financial position and goals
- ✓ Assessment of risk tolerance, investment timeline and cash flow requirements
- ✓ Understanding your short-term and long-term wealth creation objectives
- ✓ Initial consultation with no pressure or obligation

Why This Matters

A clear understanding of your starting point is the foundation of every successful investment. This step ensures we build a plan around your real-life circumstances — your income, expenses, existing assets, and future aspirations.



02 Investment Strategy

Crafting your personalised investment plan

Your success begins with a solid strategy. We develop a tailored plan supported by a clear cash flow analysis that forecasts the performance of attainable properties in the market, enabling you to make confident and informed decisions.

Key Deliverables

- ✓ Tailored investment strategy aligned to your unique circumstances
- ✓ Detailed cash flow analysis and performance forecasting
- ✓ Entity structure guidance (personal, trust, SMSF, company)
- ✓ Collaboration with alliance partners across finance, tax, and legal services

Why This Matters

Property investment without a strategy is speculation. A well-crafted plan acts as your roadmap, aligning your financial capacity with realistic market opportunities for sustainable, long-term growth.



03 Market Analysis & Insights

Data-driven insights to guide your decisions

Make informed decisions with in-depth market analysis. We provide a detailed property analysis report that includes population trends, government infrastructure spending, growth patterns, vacancy rates, and other key indicators.

Key Deliverables

- ✓ Population trends and sociodemographic research
- ✓ Government infrastructure spending and planned developments
- ✓ Historical growth patterns, vacancy rates, and yield data
- ✓ Multi-scenario projection summary for identified markets

Why This Matters

Data removes emotion from one of the biggest financial decisions you'll make. Our research uncovers the underlying drivers of property growth — giving you a clear, evidence-based view of where the strongest opportunities lie.



04 Buyers Advocacy

Expert advocacy working in your interest

Gain access to exclusive, expertly vetted opportunities that align with your budget, cash flow, and growth objectives. We apply strict criteria to identify potential investments, which are then reviewed by our team of specialists.

Key Deliverables

- ✓ Access to exclusive, expertly vetted investment opportunities
- ✓ Rigorous property due diligence including site plans, designs, and builder reputation
- ✓ Expert review ensuring alignment with your objectives
- ✓ Contractual review covering key clauses, terms, and construction timeframes

Why This Matters

Not all properties are good investments. Our advocacy role means we work exclusively in your interest — sourcing opportunities that meet strict performance criteria and conducting thorough due diligence.



05 Post-Purchase Support

Seamless coordination from settlement to success

We act as your project manager, coordinating with industry professionals to ensure a smooth settlement, leasing, and the ongoing success of your strategy. Our process provides you with lifetime access to investment evaluations.

Key Deliverables

- ✓ Project management through settlement and leasing
- ✓ Coordination with accounting, legal, finance, and property management
- ✓ Seamless handover to trusted alliance partners for ongoing services
- ✓ Lifetime access to investment evaluations and future opportunity assessments

Why This Matters

The work doesn't stop at the point of purchase. Settlement, tenant placement, and property management all require careful coordination to protect your investment from day one.



06 Portfolio Management & Review

Ongoing growth and portfolio optimisation

Diversification and risk mitigation are central to our portfolio management approach. Our extensive network spans the entire Australian property market, enabling you to invest across multiple segments.

Key Deliverables

- ✓ Ongoing portfolio performance tracking and benchmarking
- ✓ Diversification strategy across multiple market segments
- ✓ Annual rental income review and property valuation assessments
- ✓ Identification of capacity and timing for future investments

Why This Matters

Markets evolve, and so should your portfolio. Regular reviews allow us to assess performance, identify when to expand, and ensure your diversification strategy is reducing risk effectively.



**Ready to Take
the Next Step?**

Schedule Your Consultation

optioproperty.com.au/contact

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