

Your Masterclass Real Estate Profile

Work through each section honestly. There are no right or wrong answers—this is about discovering what works for you.

Why are you buying?

Select all that apply:

- ☐ Investment for capital appreciation
- ☐ Investment for rental income
- ☐ Vacation home for personal use
- ☐ Mix of personal use and and capital appreciation/income
- ☐ Retirement home

If you plan to use/visit, how often?

- ☐ Four or more times a year
- ☐ Two to three times a year
- ☐ Once a year
- ☐ Planning to live there full-time eventually

Risk & Budget

Your risk tolerance (select one):

- ☐ High ☐ Moderate ☐ Low

Investment budget: \$ _____

This represents _____ % of my total investable assets

Property & Rental Management Preference

Select one:

- ☐ Completely hands-off (turnkey, professional management)
- ☐ Moderately involved (oversee but hire help)
- ☐ Very hands-on (manage myself, coordinate renovations/upkeep)

Financial Details

Do you want to use financing? ☐ Yes ☐ No

Rental Strategy

- ☐ Short-term vacation rentals
- ☐ Long-term rentals
- ☐ Seasonal mix
- ☐ Not planning to rent

Property Preferences

Location type (rank 1-5, with 1 being most preferred):

- ___ Major city
- ___ Second city
- ___ Beach/coastal town
- ___ Historic village/mountain town
- ___ Rural/countryside

Property type (select all that interest you):

- ☐ Modern condo
- ☐ Historic village home
- ☐ Beach house/villa
- ☐ Countryside estate
- ☐ Pre-construction
- ☐ Fixer-upper

What's Important to You?

Climate preferences (select all that apply):

- ☐ Tropical climate
- ☐ Four distinct seasons
- ☐ Warm winters
- ☐ Eternal spring climate

- ☐ Hot summers
- ☐ Low humidity
- ☐ Year-round sunshine
- ☐ Mild/temperate climate

Lifestyle & activities (select all that apply):

- ☐ Beaches
- ☐ Historic sites
- ☐ Local markets and crafts
- ☐ Dining and entertainment
- ☐ Live music and festivals
- ☐ Nature and wildlife
- ☐ Gardening
- ☐ Golf
- ☐ Tennis/pickleball/padel
- ☐ Sailing and boating
- ☐ Fishing
- ☐ Hiking and mountains
- ☐ Horseback riding
- ☐ Cycling and biking trails
- ☐ Wine tasting and vineyards
- ☐ Skiing and winter sports
- ☐ Yoga and wellness retreats
- ☐ Walkable lifestyle
- ☐ Community events and social gatherings

Practical considerations (select all that apply):

- ☐ English widely spoken
- ☐ Established expat community
- ☐ Quality healthcare available
- ☐ Direct flights
- ☐ Good transport links
- ☐ Reliable internet
- ☐ Easy residency options

- ☐ Low property taxes
- ☐ Low income tax
- ☐ Low/no capital gains tax
- ☐ Political stability
- ☐ Strong rental market

Other: _____

Must Haves

Top 3 non-negotiables:

1. _____
2. _____
3. _____

Your Profile Summary

I am buying primarily for: _____

My risk tolerance is: ☐ High ☐ Moderate ☐ Low

I prefer to be: ☐ Hands-off ☐ Somewhat involved ☐ Very hands-on

My ideal location type: _____

My ideal property type: _____

My budget: \$ _____

My timeline: _____

Keep this worksheet handy during the upcoming sessions.