



Client Investment Profile Form

Mastering Off-Plan: From Developer Relationships to Client Success | By Dalila Laaribi

Complete this form during your first meeting with an investment client. A clear profile helps you tailor recommendations, set realistic expectations, and build a strategy that aligns with their goals.

Client Information

Client Name

Nationality

Residency Status

Contact Number

Email

Date of Meeting

Referred By

Investment Objectives

Primary Goal:

- ☐ Capital appreciation (buy and hold)
- ☐ Rental income (buy to let)
- ☐ Personal use / end-user
- ☐ Flipping / short-term resale
- ☐ Portfolio diversification
- ☐ Golden Visa qualification

Investment Timeline

Target ROI Expectation

Financial Profile

Total Budget (AED)

Payment Preference

Financing Method:

- ☐ Cash buyer
- ☐ Mortgage required
- ☐ Part cash / part mortgage
- ☐ Undecided — needs mortgage consultation

Existing Properties in Dubai

Property Preferences

Property Type:

- ☐ Apartment / Flat
- ☐ Villa / Townhouse
- ☐ Penthouse



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- ☐ Commercial / Office
 - ☐ Open to recommendations

Market Segment:

- ☐ Off-plan (under construction)
- ☐ Ready / secondary market
- ☐ Both

Preferred Areas

Bedroom Requirement

Must-Have Features

Risk Appetite

How would you describe the client's risk tolerance?

- ☐ Conservative — prioritizes capital preservation and stable returns
- ☐ Moderate — open to some risk for higher potential returns
- ☐ Aggressive — comfortable with high-risk, high-reward investments

Agent Notes & Next Steps

Key Observations

Recommended Strategy

Follow-Up Date

Properties to Present

Tip: Understanding a client's "why" is more important than their budget. The strategy should serve their life goals, not just their price range.