

Ref: MALCOLM MORRIS

File no:

CLIENT CHECKLIST - PURCHASE

DETAILS OF OWNERS	
1. Contact	
Full Names:	1..... 2.....
Address:
Contact details:	Tel:.....Fax:..... Mobile:1.....2.....
Email Address:	1..... 2.....
Date of Birth:	1.....2.....
2. Broker/Banker/Home Loan Details:	
Are you obtaining finance? If yes, please provide the following details:	
Bank:
Contact person:
Branch:
Address:
Contact details:	Tel:.....Fax:..... Email:.....

DETAILS OF PROPERTY	
1. General Information	
Address:
Settlement Date:
Caveat Required?	Yes <input type="checkbox"/> No <input type="checkbox"/>
EPA Certificate Required?	Yes <input type="checkbox"/> No <input type="checkbox"/>
2. Ownership (including Nomination & Substitution)	
<ul style="list-style-type: none"> • What are the names to be registered on Title? • If nominating or substituting (<i>refer to attached letter for explanation</i>), what is the relationship of the nominee and the person stated in the Contract?
<ul style="list-style-type: none"> • If more than one party to be registered on title, will the property be owned as joint proprietors or tenants in common? (<i>please refer to our letter for definition</i>) 	Joint proprietors <input type="checkbox"/> Tenants in common <input type="checkbox"/> If tenants in common, what proportion?%

<ul style="list-style-type: none"> • Address of nominee: • Date of birth: • Is the Purchaser acting as trustee of any trust? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, what is the name of the trust? • Are the documents to be executed under Power of Attorney? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please provide a copy of the Power of Attorney. 	
3. PRINCIPAL PLACE OF RESIDENCE	
Will this property be your principal place of residence?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is the property being purchased for investment purposes?	Yes <input type="checkbox"/> No <input type="checkbox"/>
4. STAMP DUTY CONCESSION/EXEMPTION	
<ul style="list-style-type: none"> • If property is your principal place of residence and your purchase price is less than \$550,000.00, do you wish to apply for the relevant stamp duty concession? Yes <input type="checkbox"/> No <input type="checkbox"/> • Are you a First Home Owner purchasing a brand new home or a home that is to be built with a purchase price less than \$750,000.00? Yes <input type="checkbox"/> No <input type="checkbox"/> • If yes, are you applying for First Home Owners Grant? Yes <input type="checkbox"/> No <input type="checkbox"/> • If you are a First Home Buyer of an established home and your purchase price is less than \$600,000.00, do you wish to apply for the 40% stamp duty discount for contracts settling after 1 July 2013? Yes <input type="checkbox"/> No <input type="checkbox"/> • Do you hold a pension or concession card? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, you will need to produce same at our office. • If you hold a pension/concession card and your purchase is less than \$750,000.00 do you wish to apply for the relevant stamp duty concession? Yes <input type="checkbox"/> No <input type="checkbox"/> 	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p><i>We will presume that your Bank is making this application unless you instruct us otherwise.</i></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>

The above information is true and correct to the best of our knowledge.

Dated:

Signed: