



CLIENT CHECKLIST - SALE

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| Property: | |
| DETAILS OF OWNERS | |
| 1. Contact | |
| Full Names: | 1..... 2..... |
| A.B.N: | |
| Trust name (if applicable) | |
| Date/s of birth: | 1..... 2..... |
| Address: | |
| Contact details: | Tel: Fax: Mobile: 1..... 2..... |
| Email Address/es: | 1..... 2..... |
| Address after settlement: | |
| 2. GST – You may need to discuss this with your accountant | |
| • Are the proprietors registered for GST? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| • Is this sale subject to GST? | Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, tax invoice will be required prior to settlement. |
| • Will the sale price be GST inclusive or exclusive? | Inclusive <input type="checkbox"/> Exclusive <input type="checkbox"/> |
| • Is any GST to be calculated on the margin scheme? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| • Is the sale by way of going concern for GST purposes? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 3. Your Current Loan Details | |
| Bank: | |
| Loan Account no: | |
| Contact person: | |
| Branch: | |
| Address: | |
| Contact details: | Tel: Fax: Email: |

DETAILS OF AGENT

Name:

Address:

Contact details: Tel:Fax:

Email address:

DETAILS OF PROPERTY**1. General Information**

Title Particulars: Volume:.....Folio:.....

Auction date (if applicable)

2. Tenancies

Is the property tenanted? Yes No
 Copy Lease enclosed? Yes No

Do you or an estate agent look after the Lease? Yourself Estate Agent
 Please provide details of the agent:
 Name:
 Address:
 Tel: Fax:
 Email:

3. Planning issues (if applicable)

- Has a town planning permit been issued in relation to this property? Yes No
 Copy enclosed? Yes/No
- Has a Section 173 Agreement issued in relation to this property? Yes No
 Copy enclosed? Yes/No
- Have you ever received any consent from any authority regarding construction over an easement etc? Yes No
 Copy enclosed? Yes/No
- Is your property located within a bushfire-prone area? Yes No
- Is there any planning restriction preventing construction of a dwelling on the property? Yes No
- Is your property located outside the Melbourne metropolitan area as defined on the attached map? Yes No

4. Services & rates

- Would you like our office to apply for all rate & planning certificates as discussed in the attached letter? Yes No
- Have you provided your most recent council rates, water rates, land tax & Owners Corporation Notices? Yes No
- Estimate of your annual Council and water rates (not including usage) and Owners Corporation fees: \$
- Is the property affected by a heritage overlay? Yes No
- Which utilities and services are connected to the property?

| <u>Name of Supplier</u> | <u>Connected</u> |
|-------------------------|------------------|
| Telephone: | Yes/No |
| Gas: | Yes/No |
| Electricity: | Yes/No |
| Water: | Yes/No |
| Sewerage: | Yes/No |
- Are there any notices or orders affecting the property? Yes No Relevant details provided? Yes/No
- Is the property part of an Owners Corporation? If so, please provide the Manager's contact details:

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| Name: |
| Address: |
| Tel:.....Fax:..... |

5. Building Works (if applicable)

- Have any building permits been issued in the past 7 years: Yes No
- Have you undertaken any building works for which you did not obtain a permit? Yes No
- If so, please provide:

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| Building permit | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Certificate of Occupancy/Final Inspection | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Home Owners Warranty Insurance | Yes <input type="checkbox"/> No <input type="checkbox"/> |

NOTE: If works were completed by you as owner builder, you must provide an independent BUILDING REPORT (please contact our office for a list of qualified inspectors)

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| 6. Pools & Spa |
| <ul style="list-style-type: none"> Does the property contain a pool or spa? Yes <input type="checkbox"/> No <input type="checkbox"/> Does fencing comply with the applicable council rules? Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 7. Growth Area Infrastructure Contribution (GAIC) as stated in our letter |
| <ul style="list-style-type: none"> Is your property subject to a GAIC liability, or have you received any notification that the property is likely to be affected by GAIC in any way? Yes <input type="checkbox"/> No <input type="checkbox"/> Copies of relevant documents enclosed? Yes <input type="checkbox"/> No <input type="checkbox"/> |

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| GOODS |
| <p>We advise that we shall include in your Contract of Sale the following goods to be sold with the property, unless you advise us otherwise as to any specific exclusions or further inclusions which are to pass with the property:-</p> <p><i>“All fixed floor coverings, electric light fittings & window furnishings”</i></p> |

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| SETTLEMENT |
| <ul style="list-style-type: none"> Do you require our office to bank settlement proceeds on your behalf following settlement? A fee of \$15.00 plus GST will apply. Yes <input type="checkbox"/> No <input type="checkbox"/> Your Bank account details: <ul style="list-style-type: none"> Bank: Account Name: BSB: Account: <p>*Please note we are unable to make over the counter deposits into online or internet banking.</p> |

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

Signed:

Date :

VICTORIAN GOVERNMENT REGIONS & LOCAL GOVERNMENT AREAS (METROPOLITAN MELBOURNE)

