



ROTMAN & MORRIS
SOLICITORS

429 South Road **BENTLEIGH** 3204
Phone: 9532 1500

156 Hawthorn Road **CAULFIELD NORTH** 3162
Phone: 9533 0644

33 Pier Street **DROMANA** 3936
Phone: 5981 0221

67 Glen Eira Road **RIPPONLEA** 3185
Phone: 9523 6280

www.rotmanmorris.com.au

Your legal connection

SALE CHECKLIST

Property:

DETAILS OF OWNERS

1. Contact

Full Names:	1.....
	2.....
Individual's A.B.N/S :
Trust name (if applicable)
	Trust ABN:
Is the Trust registered for GST?:	Yes/No
Full name of all Trust beneficiaries

Date/s of birth:	1.....2.....
Address:

Contact details:	Tel: Fax
	Mobile: 1..... 2.....
Email Address/es:	1.....
	2.....

REF:	DOL :	VOI :	ATO :	AUTHORISATION :
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Your address after settlement:

2. GST – You may need to discuss this with your accountant

- Are the owners registered for GST? Yes No
- Is this sale subject to GST? Yes No
If yes, tax invoice will be required prior to settlement.
- Will the sale price be GST inclusive or exclusive? Inclusive Exclusive
- Is any GST to be calculated on the margin scheme? Yes No
- Is the sale by way of going concern for GST purposes? Yes No
- Is the property - **(See Information Statement for definitions)**
- New residential premises? Yes No
- Have substantial renovations been undertaken? or Yes No
- Commercial residential premises? i.e a motel Yes No

3. Your Current Loan Details

Bank:
Loan Account no:
Contact person:
Address :
Email :
Contact details: Tel: Fax:

DETAILS OF AGENT

Firm name:
Selling agent :
Address:
Contact details: Tel: Fax:
Agent's 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 the property affected by a heritage overlay? Yes No
- Is there any planning restriction preventing construction of a dwelling on the property? Yes No
- Is your property located outside the Melbourne metro area as defined on the attached map? Yes No

Are you aware of, or have you received any notification of any proposed development or construction in the nearby vicinity? Yes No

<p>i.e. proposed apartments/townhouses, change of use or zoning of nearby land</p>	<p>If yes, please provide copies of all documentation or notices you have received</p>												
<p>4. Services & rates</p>													
<ul style="list-style-type: none"> • Would you like our office to apply for all rate & planning certificates as discussed in the attached letter? • Have you provided your most recent council rates, water rates, land tax & Owners Corporation Notices? • Estimate of your annual Council and water rates (not including usage) and Owners Corporation fees: • Which utilities and services are connected to the property? 	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>\$</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 60%;"></td> <td style="text-align: right;"><u>Connected</u></td> </tr> <tr> <td>Telephone:</td> <td style="text-align: right;">Yes/No</td> </tr> <tr> <td>Gas:</td> <td style="text-align: right;">Yes/No</td> </tr> <tr> <td>Electricity:</td> <td style="text-align: right;">Yes/No</td> </tr> <tr> <td>Water:</td> <td style="text-align: right;">Yes/No</td> </tr> <tr> <td>Sewerage:</td> <td style="text-align: right;">Yes/No</td> </tr> </table>		<u>Connected</u>	Telephone:	Yes/No	Gas:	Yes/No	Electricity:	Yes/No	Water:	Yes/No	Sewerage:	Yes/No
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Gas:	Yes/No												
Electricity:	Yes/No												
Water:	Yes/No												
Sewerage:	Yes/No												
<ul style="list-style-type: none"> • Are there any notices or orders affecting the property? • Relevant details/copy provided? 	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes/No</p>												
<ul style="list-style-type: none"> • Is the property part of an Owners Corporation? If so, please provide the Manager's contact details: * Is your property subject to a State Revenue Office Congestion Levy? 	<p>Name:</p> <p>Address:</p> <p>Tel:.....Fax:.....</p> <p>Yes/No</p>												
<p>5. Building Works (if applicable)</p>													
<ul style="list-style-type: none"> • Have any building permits been issued in the past 10 years: 	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>												
<ul style="list-style-type: none"> • Have you undertaken any building works for which you did not obtain a permit? 	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p><i>If yes, please provide details</i></p>												

- If so, please provide:

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)

6. Pools, spas or solar panels

- Does the property contain a pool or spa? Yes No
 - Does pool or spa fencing comply with the applicable council rules? Yes No
 - Does the property contain any solar panels? Yes No
- If so are the panels –
- a) owned outright by you Yes No
 - b) subject to any lease or purchase agreement Yes No

7. Growth Area Infrastructure Contribution (GAIC)

- 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 No
- Copies of relevant documents enclosed? Yes No

8. FOREIGN RESIDENT CAPITAL GAINS TAX as stated in our letter

Do you anticipate a sale price for your property in excess of **\$750,000.00**? Yes No

If yes, please refer to this link www.ato.gov.au/FRCGW

9. YOUR CITIZENSHIP – All clients must complete this section for SRO purposes

What is your country of tax residence?

.....

Are you or any trust beneficiaries Australian citizens? Yes No / Yes No

If not, what is your country of citizenship

.....

Have you ever owned property in any other names? Yes No

10. GOODS

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:-

“All fixed floor coverings, electric light fittings & window furnishings”

Chattels to be excluded :

11. SETTLEMENT

• Do you require our office to bank settlement proceeds on your behalf following settlement? A fee of \$25.00 plus GST per account will apply. Yes No

• Your Bank account details: Bank:
Account Name:
BSB:
Account:

*Please note we are unable to make over the counter deposits into online or internet banking.

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

Signed:

Date : / /

VICTORIAN GOVERNMENT REGIONS & LOCAL GOVERNMENT AREAS (METROPOLITAN MELBOURNE)

