



**ROTMAN & MORRIS**  
SOLICITORS

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*Your legal connection*

## **PURCHASE CHECKLIST**

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

**1. PRINCIPAL PLACE OF RESIDENCE**

Are you an Australian citizen?	1 Yes/No	2 Yes/No
If no, do you hold a Permanent Visa , or if you are a New Zealand citizen do you hold a Special Category Visa 444 :	1 Yes/No/Not applicable	2 Yes/No/Not applicable
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"/>	
Have you ever owned property in any other name?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please advise other name/s used	

**DETAILS OF PROPERTY**

**General Information**

Settlement Date:	...../...../20.....
Caveat Required?	Yes <input type="checkbox"/> No <input type="checkbox"/>
EPA Certificate Required?	Yes <input type="checkbox"/> No <input type="checkbox"/>

**Ownership (including Nomination & Substitution)**

<ul style="list-style-type: none"> <li>What are the names to be registered on Title?</li> </ul>	<p>.....</p> <p>.....</p>
<ul style="list-style-type: none"> <li>If nominating or substituting (refer to attached letter for explanation), what is the relationship of the nominee and the person stated in the Contract?</li> </ul>	<p>.....</p>
<ul style="list-style-type: none"> <li>If more than one party is to be registered on title, will the property be owned as joint proprietors or tenants in common? (please refer to our letter for explanation)</li> </ul>	<p>Joint proprietors <input type="checkbox"/> Tenants in common <input type="checkbox"/></p> <p>If tenants in common, what proportion?</p> <p>.....%</p>
<ul style="list-style-type: none"> <li>Address of nominee:</li> </ul>	<p>.....</p>
<ul style="list-style-type: none"> <li>Date of birth:</li> </ul>	<p>...../...../.....</p>
<ul style="list-style-type: none"> <li>Is the Purchaser acting as trustee of any trust?</li> </ul>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, what is the name of the trust?</p> <p>.....</p> <p>Trust ABN: .....</p>

	Please list all beneficiaries of the Trust : 1..... 2..... 3..... 4.....
<ul style="list-style-type: none"> <li>Is the Trustee acting as Bare Trustee or Custodial Trustee for a Self- Managed Superannuation Fund borrowing monies for this purchase?</li> </ul>	Yes/No If yes, please provide Bare Trustee's ABN : .....
<ul style="list-style-type: none"> <li>Are the documents to be executed under Power of Attorney?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please provide us with the <b>original</b> Power of Attorney by return

**STAMP DUTY CONCESSION/EXEMPTIONS**

<ul style="list-style-type: none"> <li>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?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p><b><u>GST</u></b></p> <ul style="list-style-type: none"> <li>Is the property new residential premises? or</li> <li>Have substantial renovations been undertaken? or</li> <li>Commercial <u>residential</u> premises? i.e. a motel</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/>
<p><b><u>FIRST HOME OWNERS :</u></b></p> <ul style="list-style-type: none"> <li>Are you a <b>First Home Owner</b> purchasing a <b>brand new home</b> or a home that is to be built with a purchase price less than \$750,000.00?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> <li>If yes, are you applying for a First Home Owners Grant (FHOG)? <i>We will presume that your Bank is making this application unless you instruct us otherwise</i></li> <li>If you are a <b>First Home Buyer</b> of an <b>established home</b> and your purchase price is \$600,000.00 or less, you will receive a full duty exemption. For properties with a purchase price between \$601,000.00-\$750,000.00, do you wish to apply for the First Home Owner duty reduction?</li> <li>Have you previously owned residential property, either jointly or separately or with some other person before 1 July 2000 in any state or territory of Australia?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>   Yes <input type="checkbox"/> No <input type="checkbox"/>  Yes <input type="checkbox"/> No <input type="checkbox"/>

<ul style="list-style-type: none"> <li>• Have you occupied a residential property for a continuous period for at least six months in which you acquired a relevant interest on or after 1 July 2000?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Have you previously received the FHOG in any other state or territory of Australia?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Do you have a spouse/partner that is not listed as a transferee in the contract to purchase this property?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> <li>• What is your country of citizenship?</li> </ul>	..... .....
<ul style="list-style-type: none"> <li>• What is your country of tax residence?</li> </ul>	..... ..... .....
<ul style="list-style-type: none"> <li>• Do you hold a pension or concession card?  <i>If yes, you must produce the original to us for sighting prior to settlement</i></li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> <li>• If you hold a pension/concession card and your purchase is less than \$750,000.00 <b>and you have not claimed a Pensioner duty concession before</b>, do you wish to apply for the relevant stamp duty concession for this purchase?</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>

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

Signed: ..... Date : / /