

PURCHASER CHECKLIST

POST CONTRACT



Property address:

Our ref:

Settlement date:

Purchaser Client / Client contact:

Client email:

Phone:

Mob:

Vendor:

Vendor's legal rep:

Phone:

Mortgagee details:

Phone:

SEE PURCHASER PRE-CONTRACT CHECKLIST FOR ITEMS 1 TO 8

9	9.1	Provide written advice to client re items 2 and 3 in Purchaser Pre-Contract Checklist	<input type="checkbox"/>
	9.2	Record important dates in your diary	<input type="checkbox"/>
10	10.1	Obtain title search and apply for rating certificates/ updates (if required)	<input type="checkbox"/>
	10.2	Check with client if any Nomination proposed: Nominee: Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Nominee Address:
	10.3	Prepare Nomination and Sub-sales Statutory Declaration form	<input type="checkbox"/> Yes <input type="checkbox"/> No
11	11.1	Principal Place of Residence (PPR)	<input type="checkbox"/> Yes <input type="checkbox"/> No
	11.2	Prepare PPR form (if applicable)	<input type="checkbox"/>
12		Prepare and lodge caveat	<input type="checkbox"/> Yes <input type="checkbox"/> No - Lodged: Dealing No:
13		Prepare and submit requisitions on title to vendor's legal representative (if applicable)	<input type="checkbox"/> Yes - Date submitted: <input type="checkbox"/> N/A (new contract)
14		Section 27 release of deposit -	
	14.1	If received, send to client for signing or object if not satisfactory	<input type="checkbox"/> Date sent to client: Date to object (28 days from receipt)
	14.2	Signed section 27 received from client - send to vendor's legal representative	<input type="checkbox"/> Date sent:
15		Transfer of land	<input type="checkbox"/> Joint proprietors <input type="checkbox"/> Tenants in common <input type="checkbox"/> N/A
	15.1	Prepare and explain to client	<input type="checkbox"/> Equal shares - 50/50 or <input type="checkbox"/> Proportions -
	15.2	Received from client and forwarded to vendor's legal representative	<input type="checkbox"/> Date sent to client: <input type="checkbox"/> Date sent to vendor's legal rep:
16		Mortgage	
	16.1	Contact mortgagee and provide copy documents	<input type="checkbox"/> Date:
	16.2	Check with mortgagee - mortgage documents returned, insurance arranged and ready to settle	<input type="checkbox"/>
17		Adjustments	<input type="checkbox"/> Prepared Sent to: <input type="checkbox"/> vendor's legal rep <input type="checkbox"/> client <input type="checkbox"/> Approved by vendor's legal rep and cheque details provided
18		Confirm settlement figures with client and obtain balance of moneys and stamp duty and registration fees (if required)	<input type="checkbox"/>
19		Book final meter reading for water	<input type="checkbox"/>
20		Advise client to arrange connection/transfer of water, gas, electricity and telephone and final inspection of property	<input type="checkbox"/>
21		Provide cheque details to mortgagee	<input type="checkbox"/>
22		Obtain final search on	<input type="checkbox"/> OK <input type="checkbox"/> Not OK
23		Settlement	Arranged with: <input type="checkbox"/> Vendor's legal rep <input type="checkbox"/> Mortgagee <input type="checkbox"/> Cheques received from purchaser <input type="checkbox"/> Completed <input type="checkbox"/> Got GST invoice/ N/A <input type="checkbox"/> Invoice sent to client <input type="checkbox"/> Got keys/ N/A
		Time: am/pm	
		Venue:	
24		Confirm settlement by telephone with client and advise to collect keys	<input type="checkbox"/>
25		Documents	<input type="checkbox"/> Stamped & lodged by mortgagee OR <input type="checkbox"/> Stamped & lodged in dealing nos. <input type="checkbox"/> Registered & client advised Title in deeds OR <input type="checkbox"/> Title sent to client <input type="checkbox"/> Receipt of title acknowledged & sent to deeds
26		Land tax	<input type="checkbox"/> N/A/Paid on: by: <input type="checkbox"/> Obtained receipt or copy & sent to client/vendor's legal rep
27	27.1	Notice of acquisition	Lodged at Land Registry on:
		Notice of trust acquisition <input type="checkbox"/> Yes <input type="checkbox"/> N/A <input type="checkbox"/> Sent to SRO	Copy sent to Council/water authority on:
	27.2	Advised owners corporation of new owner / absentee owner's address / tenant	<input type="checkbox"/> N/A <input type="checkbox"/> Letter sent on:
28		If tenant in possession - send letter of authority as to future rent payment	<input type="checkbox"/> N/A <input type="checkbox"/> Sent on:
29		Account	<input type="checkbox"/> Prepared <input type="checkbox"/> Sent to client <input type="checkbox"/> Paid
30		File closed	<input type="checkbox"/> Date closed: