



Property Transaction Intake Form

Date:

CLIENT 1:

GIVEN NAME/S:

RESIDENTIAL ADDRESS:

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POSTAL ADDRESS:

PHONE NUMBER: (Home)

(Work)

(Mobile)

EMAIL:

DATE OF BIRTH: OCCUPATION:

Two forms of current identification are attached eg driver licence, Medicare card, passport, Centrelink card, etc.

I hereby consent to tax invoices being issued electronically.

YES NO Are you an existing client of RMS?

If no, how did you hear about us?

SIGNATURE:

CLIENT 2:

GIVEN NAME/S:

RESIDENTIAL ADDRESS:

.....

POSTAL ADDRESS:

PHONE NUMBER: (Home)

(Work)

(Mobile)

EMAIL:

DATE OF BIRTH: OCCUPATION:

Two forms of current identification are attached eg driver licence, Medicare card, passport, Centrelink card, etc.

I hereby consent to tax invoices being issued electronically.

YES NO Are you an existing client of RMS?

If no, how did you hear about us?

SIGNATURE:

IF TRUST IS CLIENT:

NAME AND ABN OF TRUST:

NAME OF TRUSTEE/S:

Copy of Trust Deed and any amendments to Trust Deed attached

IF COMPANY IS CLIENT OR TRUSTEE OF TRUST:

NAME AND ACN OF COMPANY:

NAME OF DIRECTOR/S AND COMPANY SECRETARY:

.....

Copy of Constitution and any amendments to Constitution attached

PROPERTY TRANSACTION INFORMATION:

OTHER PARTY:

NAME/S:

RESIDENTIAL ADDRESS:

.....

POSTAL ADDRESS:

PHONE NUMBER:

DATE OF BIRTH:

SOLICITOR DETAILS:

PROPERTY:

ADDRESS OF LAND:

LOT ON PLAN DESCRIPTION:

TITLE REFERENCE:

AREA:

COPY OF RATES NOTICE OR CONTRACT IF AVAILABLE ATTACHED: YES NO

ARE THERE ANY CHATTELS INCLUDED IN THE SALE?

If yes -

PURCHASE PRICE:

DEPOSIT SUM:

CONDITIONS INCLUDED IN CONTRACT AND TIMEFRAME:

Finance. If yes – timeframe:

Building and Pest Inspections. If yes – timeframe:

Due Diligence. If yes – timeframe:

Other. Please specify and advise timeframe:

SETTLEMENT DATE / LENGTH OF CONTRACT:

SPECIAL CONDITIONS THAT HAVE BEEN AGREED VERBALLY BETWEEN THE PARTIES?

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Are you or the other party a non-Australian entity?