

BUYER REPRESENTATION / PACK 04

Buyer agency and acquisition pack

04

A clean appointment, search, due diligence and negotiation file for buyer-side work.

THE FIVE-STAGE CONTROL MAP

A file becomes defensible when each stage has an owner, a current source, an approval and retained evidence.

01 Brief	02 Appoint	03 Search	04 Check	05 Acquire
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W AGENT RULE

Draft the operational brief. Use official prescribed forms. Route legal instruments to the licensed professional responsible for them.

PACK 04 / ACTION CHECKLIST

Build the evidence file

Tick only when the document exists, is current, has been approved by the right person and is stored against the matter.

01	Service scope	Define search, appraisal, due diligence coordination, auction bidding, negotiation and post-contract exclusions.	☐
02	Written authority	State commission, expenses, GST, rebates, referral arrangements, term, termination and complaints route.	☐
03	Customer due diligence	Complete AML/CTF steps before providing a designated acquisition service.	☐
04	Buyer brief	Budget, finance position, purpose, property criteria, risk limits, decision makers and conflicts.	☐
05	Research file	Listings, comparables, planning and overlay checks, owners corporation, title flags and agent conversations.	☐
06	Professional checks	Route contract, Section 32, building, pest, finance, tax and planning advice to qualified professionals.	☐
07	Offer authority	Record the client's maximums, conditions, deposit, settlement and written instruction for every offer or bid.	☐
08	Conflict and referral register	Disclose vendor-side interests, related providers, commissions, rebates and any limitation on choice.	☐

PACK 04 / SIGNING BOUNDARY

What W Agent must not blur

These controls are deliberately conservative. They protect the client, the agency and the professional who is responsible for the final instrument.

1	Do not describe research as legal, valuation, building, tax, financial or planning advice.
2	Never act for both sides where duties conflict unless the law, authority and informed consent allow the precise arrangement.
3	A client approval record should show what was authorised, when, by whom and under which version of the deal terms.

OFFICIAL SOURCES

Open the live source again immediately before use. A saved or printed copy can become stale.

01	CAV authorities https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/running-your-business/authorities-commissions-and-contracts/authorities-rebates-and-commission
02	CAV professional conduct https://www.consumer.vic.gov.au/licensing-and-registration/estate-agents/running-your-business/professional-conduct/professional-conduct-and-obligations
03	AUSTRAC real estate services https://www.austrac.gov.au/new-austrac/designated-services-newly-regulated-entities/real-estate-designated-services

IMPORTANT

This W Agent pack is a general operational checklist, not legal, conveyancing, financial, tax, valuation, planning, building, employment or franchising advice. It is not a prescribed form, authority, contract, disclosure document or government-approved instrument. Laws, forms, facts and transaction risks change. Obtain matter-specific advice and use current official or professionally licensed documents before signing, serving, advertising, receiving trust money or providing a regulated service.