

Seller listing brief

Unsigned preparation draft - review the complete document before use.

Blank W form - enter reviewed information only.

Prepare the property, campaign and handover details.

Contact

Your full name

Contact email

Contact phone

Property

Property address

Suburb

State or territory (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Postcode

Seller listing brief

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Property

Property type

Plan

Sale goal

Details

Preferred sale timing

Plan

Campaign preference (Private sale / Auction / Discuss options)

Property features

Seller listing brief

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Plan

Facts to review with your conveyancer

Documents already available

Requested next step

Sales authority instructions

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Supply the facts for a licensed or lawyer-approved authority.

Contact

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Postcode

Sales authority instructions

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Property

Property type

Agency

Agency legal entity

Trading name

ABN

Estate-agent licence number

Agency email

Agency phone

Sales authority instructions

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Appointment

All owners and signing capacities

Appointment preference (Exclusive / General / Auction / Discuss with provider)

Timing

Proposed term start

Proposed term end

Fees and evidence

Proposed reasonable selling estimate

Evidence supporting the estimate

Sales authority instructions

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Fees and evidence

Proposed commission including GST

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Marketing and other expenses including GST

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Rebate and commission-sharing facts to review

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Review

Required professional review

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Buyer acquisition brief

Unsigned preparation draft - review the complete document before use.

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Define the search and the checks before a purchase.

Contact

Your full name

Contact email

Contact phone

Search

Target state (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Preferred suburbs

Property type

Budget range

Buyer acquisition brief

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Search

Target timing

Must-have features

Things to avoid

Review

Finance stage (To discuss / Broker discussion underway / Pre-approval stated by customer / Cash purchase stated by customer)

Inspection and professional checks wanted

Buyer authority instructions

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Prepare scope, fees and conflicts for professional review.

Contact

Your full name

Contact email

Contact phone

Agency

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Trading name

ABN

Estate-agent licence number

Buyer authority instructions

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Agency

Agency email

Agency phone

Appointment

Acquisition services requested

Target location

Budget range

Timing

Proposed term start

Buyer authority instructions

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Timing

Proposed term end

Commercial terms

Proposed fee including GST

Expenses and payment milestones

Conflicts, referral benefits and rebates to disclose

Termination terms to review

Landlord onboarding brief

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Organise property details and management preferences.

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Landlord onboarding brief

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Property

Property type

Management

Owners and authorised contacts

Management model (Whole home / Shared residential rental / Rooming-house review / Short-stay review)

Proposed rent for review

Timing

Proposed available date

Operations

Access and key arrangements

Landlord onboarding brief

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Operations

Insurance provider and renewal date only

Safety checks and minimum-standards evidence

Known repairs and service providers

Management authority instructions

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Prepare management scope and commercial terms.

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Management authority instructions

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Property type

Agency

Agency legal entity

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Estate-agent licence number

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Agency phone

Management authority instructions

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Appointment

Management and letting services

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Commercial terms

Management fee including GST

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Letting fee including GST

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Other fees and expenses including GST

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Operations

Proposed nonurgent repair approval limit

--

Proposed inspection frequency

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Management authority instructions

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Operations

Urgent repair arrangements

Commercial terms

Rebates or benefits to disclose

Appointment

Term and termination instructions

Rental advertising readiness

Unsigned preparation draft - review the complete document before use.

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Record evidence before an advertisement is approved.

Contact

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Contact phone

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State or territory (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Postcode

Rental advertising readiness

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Property

Property type

Advertisement

Proposed fixed weekly rent

Timing

Proposed availability

Checks

Minimum-standards evidence and unresolved items

Gas, electrical and smoke-alarm check details

Rental advertising readiness

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Checks

Photo permission and accuracy checks

Fee-free payment method to confirm

Current prescribed application source

Review

Outstanding review steps

Maintenance request

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Describe an issue and the access needed to resolve it.

Contact

Your full name

Contact email

Contact phone

Property

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Maintenance request

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Property

Property type

Timing

Date noticed

Issue

Reported urgency (Routine / Potential urgent repair - contact W now)

Issue and affected area

Immediate safety concern

Maintenance request

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Issue

Photos or evidence available - describe only

Access

Access preference and contact

Response

Requested response

Inspection record

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Record observations without automatically serving a notice.

Contact

Your full name

Contact email

Contact phone

Property

Property address

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Postcode

Inspection record

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Property

Property type

Timing

Inspection date

Visit

Inspection type

Attendees

Notice and consent arrangements already checked

Observations

Condition observations

Inspection record

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Blank W form - enter reviewed information only.

Follow-up

Proposed follow-up actions

Observations

Evidence references

Property handover record

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Track keys, documents and unresolved handover items.

Contact

Your full name

Contact email

Contact phone

Property

Property address

Suburb

State or territory (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Postcode

Property handover record

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Property

Property type

Timing

Proposed handover date

Handover

Key and access-item inventory

Utility and meter-reading arrangements

Documents to supply

Property handover record

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Blank W form - enter reviewed information only.

Handover

Condition and outstanding work

Follow-up

Items still awaiting confirmation

Rental exit preparation

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Plan the exit checks; this does not serve a legal notice.

Contact

Your full name

Contact email

Contact phone

Property

Property address

Suburb

State or territory (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Postcode

Rental exit preparation

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Property

Property type

Timing

Proposed end date

Checks

Current agreement and any reviewed notice

Entry and exit condition evidence

Exit

Cleaning and belongings arrangements

Rental exit preparation

Unsigned preparation draft - review the complete document before use.

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Exit

Key-return arrangement

Review

RTBA process and issues to review - no bank details

Outstanding legal or practical questions

Investor property strategy

Unsigned preparation draft - review the complete document before use.

Blank W form - enter reviewed information only.

Prepare goals and assumptions for qualified advice.

Contact

Your full name

Contact email

Contact phone

Plan

Property goals

Details

Time horizon

Budget range

Investor property strategy

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Details

Locations being considered

Plan

Cash-flow assumptions - no account details

Risks and contingencies

Tax, finance and legal advice required

Next decision to investigate

Project buyer brief

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Blank W form - enter reviewed information only.

Organise an off-the-plan enquiry and source checks.

Contact

Your full name

Contact email

Contact phone

Details

Project or developer

Official project URL

Project location

Property type

Project buyer brief

Unsigned preparation draft - review the complete document before use.

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Details

Budget range

Target timing

Plan

Contract, sunset, deposit and completion questions

Property requirements

Requested introduction and information-sharing preference

Commercial lease instructions

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Prepare the business facts for a lawyer-reviewed lease.

Contact

Your full name

Contact email

Contact phone

Property

Property address

Suburb

State or territory (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Postcode

Commercial lease instructions

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Property

Property type

Details

Tenant or landlord legal entity

Proposed permitted use

Proposed term and options

Proposed rent and GST treatment

Plan

Outgoings and disclosure questions

Commercial lease instructions

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Plan

Fit-out, repair and make-good instructions

Guarantee and security terms for legal review - no account details

Retail-leasing and legal review required

Business sale instructions

Unsigned preparation draft - review the complete document before use.

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Prepare transaction facts for legal and accounting review.

Contact

Your full name

Contact email

Contact phone

Details

Business and legal entity

Business location

Proposed price and allocation

Business sale instructions

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Plan

Assets, stock, IP and excluded items

Premises lease and consent questions

Employee transfer questions - no employee personal data

Due diligence and conditions

Section 52, legal and accounting review

Agency business profile

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Keep verified entity and service details together.

Agency

Agency legal entity

Trading name

ABN

Estate-agent licence number

Agency email

Agency phone

Operations

Business address

Agency business profile

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Operations

Responsible licensed person

Verified jurisdiction permissions and restrictions

Professional insurance provider and renewal

Trust-account arrangement or confirmed exemption - no account numbers

Complaint contact and procedure

Agency business profile

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Review

Evidence still to verify

Commission and rebate preparation

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Prepare facts for the required current authority disclosures.

Agency

Agency legal entity

Trading name

ABN

Estate-agent licence number

Agency email

Agency phone

Property

Property address

Commission and rebate preparation

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Property

Suburb

State or territory (VIC / NSW / QLD / WA / SA / TAS / ACT / NT)

Postcode

Property type

Disclosures

Commission including GST

Expenses and outgoings including GST

Commission and rebate preparation

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Disclosures

Rebates or no-rebate facts

Commission-sharing persons and amounts

Relevant interests and conflicts

Review

Director-approved wording and client-copy checks

Complaint record

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Record a concern, response and follow-up.

Contact

Your full name

Contact email

Contact phone

Timing

Date received

Details

Property or matter reference

Plan

Concern and requested outcome

Complaint record

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Blank W form - enter reviewed information only.

Plan

Response and investigation notes

Proposed resolution

Timing

Follow-up date

Privacy and contact preferences

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Record the customer choices for this matter.

Contact

Your full name

Contact email

Contact phone

Details

Matter or property

Plan

Service contact preference (Email / Phone / Either)

Marketing preference (No marketing / Separate express marketing consent given)

Provider introduction preference (W-only contact / Discuss before sharing / Specific provider sharing requested)

Privacy and contact preferences

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Plan

Exact information and named recipient requested for sharing

Withdrawal or correction request

Timing

Date recorded

AML and CTF readiness review

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Track business program tasks; this is not customer due diligence.

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Trading name

ABN

Estate-agent licence number

Agency email

Agency phone

AML and CTF readiness review

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Program

Designated services and eligibility reviewed

Business risk-assessment status

Policies and process customisation status

Compliance officer and escalation contact

Training and staff readiness

AML and CTF readiness review

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Program

Secure CDD and reporting controls - no customer ID data

Review

Program approval and gaps

Rental notice preparation

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Collect facts for reviewing the correct current notice.

Contact

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Contact phone

Property

Property address

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Postcode

Rental notice preparation

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Property

Property type

Notice

Notice type to review

Relevant facts and dates

Statutory ground or section for professional review

Evidence

Supporting evidence available

Rental notice preparation

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Timing

Proposed notice date

Proposed effective date

Service

Proposed service method for review

Review

Outstanding form, ground and timing checks