

## FAMILY PROPERTY TRANSFER: YOUR FIRST MEETING CHECKLIST

### What to bring to your first meeting

You do not need to have every answer before your first meeting. Bring the information and documents you already have, together with any questions or concerns. This will help us understand what your family wants to achieve and identify the next steps.

#### WHAT TO BRING

##### ☐ Property details and any documents you already have

Bring any current title information, property address details and relevant property documents you already have.

##### ☐ Any valuation or market appraisal already obtained

Bring any valuation report or market-value information already obtained for the property.

##### ☐ Mortgage and lender details

Bring details of any mortgage, loan or other finance affecting the property, including your lender if applicable.

##### ☐ Any agreements, court orders or existing family arrangements

Bring any written agreements, court orders, family arrangements or other documents relevant to the proposed transfer.

##### ☐ Details of the current owner or owners

Have the full name and contact details of the current owner or owners involved in the proposed transfer.

##### ☐ Current identification for everyone involved

Have current identification available for the parties involved, where required for verification and conveyancing purposes.

##### ☐ Details of the family member receiving the property

Have the full name and contact details of the family member or other person who will receive the property or an interest in it.

##### ☐ What you want to achieve and any concerns you have

Write down anything you want to discuss, including timing, ownership, value, finance, duty, tax or what happens after the transfer.

##### ☐ How the property will be transferred

Let us know whether the property is intended to be gifted, sold at market value, transferred at a reduced price or dealt with under another family arrangement.

#### BRING WHAT YOU HAVE

It is completely normal not to have every document at the first meeting. What matters most is understanding who is involved, what is being proposed and what your family wants the transfer to achieve

General information only. This checklist does not take into account your individual circumstances and is not a substitute for legal, tax or financial advice.

#### NOTES / QUESTIONS FOR YOUR CONVEYANCER

#### Ready to discuss your family transfer?

Contact Bliss Conveyancing to arrange a confidential discussion about the property or business transfer your family is considering. Contact us at 1300 659 231 or visit our website, at [www.blissconveyancing.com.au](http://www.blissconveyancing.com.au).

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