

# STAMP DUTY, CONCESSIONS & DUTY REDUCTIONS

This form is will be relied upon when assessing Stamp Duty.

NATIONALITY

Have you previously owned real estate anywhere in a different name? (including in a maiden name)

No  Yes, and my previous full name was: .....

Are you a foreign natural person? (You a NOT a foreign natural person if you are an Australian citizen, the holder of a permanent visa, or a New Zealand citizen holding a Special Category Visa)

No (You MUST also state your nationality below)  Yes (You MUST state your nationality AND country of tax residence below)

Nationality: ..... Country of tax residence: .....

TRUST

Are you acting on behalf of a trust?

No  Yes, and the name of the trust is:

Type of trust is:  Discretionary  Fixed  Unit  Self-managed super fund  Other

Is the trust a foreign trust?  Yes  No

SHARE(S)

What is your interest held after the transfer? (i.e. What will be your personal share of the property?)

of  shares, being  % of the property (e.g. 1 of 2 shares, being 50% of the property.)

Are you and the sellers of the property related or associated in any way?

No  Yes, we are associated by: .....

CONCESSIONS

Will you be occupying the property as your Principal Place of Residence within the next 12 months?

**No** If "No" please check this box only, then go direct to the "NOMINATION" section on page 2.

**Yes** If "Yes" an estimated date of occupation MUST be provided below:

Date on which you will occupy the property: ...../...../.....

Are you claiming any concession or reduction of Stamp Duty?

**No** (If "No" please check this box only, then go direct to the "NOMINATION" section on page 2.)

**Yes** (If "Yes" please respond to the questions below before signing this form.)

PPR

Are you claiming the Principal Place of Residence concession (PPR)?

No  Yes, and I understand that I cannot also choose the FHB or PC if I have chosen the PPR.

OR

FHB

Are you claiming the First Home Buyer Duty Concession or Exemption (FHB)?

No  Yes, and I understand that I cannot also choose the PPR or PC if I have chosen the FHB.

OR

PC

Are you claiming the Pensioner Concession (PC)?

No  Yes, and I understand that I cannot also choose the FHB or FHB if I have chosen the PC. I also understand that I must provide a copy of my pensioner card front and back in order to claim the PC.

OTP

Is this sale subject to an Off-the-Plan Concession or a Refurbishment Concession?

(“Off-the-plan” means that the property was not on a registered title as at the day of sale, and the Plan of Subdivision is not yet registered.)

No  Yes, I have checked with the State Revenue Office and I confirm that this concession applies.

(Information about off-the-plan concessions can be found on the website of the State Revenue Office at:

<http://www.sro.vic.gov.au/2017-plan-duty-concession-changes-faqs>)

OTHER

Are you claiming another exemption that is not listed here?

(For further information on concessions visit the State Revenue Office website at <http://www.sro.vic.gov.au/fhbduty> OR <http://www.sro.vic.gov.au/exemptions-and-concessions>)

No  Yes, the concession exemption I claim is: .....

<b>NOMINATION</b>	<p><b>Sub-sale, Nomination and Options</b></p> <p>Stamp duty may be affected if purchasers change, or their shares in the property change between the day of sale and settlement. If there has been a change of purchaser or the size of the shares of the property, details are required.</p> <p><b>Is the transferee(s) the same party as the purchaser(s) named in the contract?</b></p> <p><input type="checkbox"/> <b>Yes</b> (If "Yes" please check this box only, then go direct to the "Options" section below.)</p> <p><input type="checkbox"/> <b>No</b>, a purchaser has been added or deleted or ownership shares have changed since the contract was first signed and the changes are as follows: .....</p> <p>.....</p>
<b>SHARES</b>	<p><b>Was there any change in the proportions from those originally appearing in the contract?</b> <i>(Is one purchaser now going to own a greater share than the other?)</i></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes, in the contract the shares were..... <i>(e.g. joint ownership, or equal shares)</i></p> <p>but now the shares will be .....</p>
<b>PARALLEL</b>	<p><b>Was there a parallel arrangement (building contract) or other arrangement associated with this property?</b> <i>(i.e. Was there an agreement between the first purchaser and the nominee to arrange building works on the land for payment?)</i></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes, the arrangement is .....</p> <p>.....</p>
<b>DEVELOPMENT</b>	<p><b>In relation to the property, did any land development (including construction of a building of refurbishment) occur between the contract date and the transfer date?</b> <i>(i.e. Preparing a plan of subdivision or taking any steps to have a plan registered, applying for or obtaining a planning permit, applying for or obtaining a building permit, or doing anything for which a building permit would be required, or otherwise developing or changing the land in a way that would lead to the enhancement of its value.)</i></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes, the details of the land development between the day of sale and settlement are: .....</p> <p>.....</p> <p>.....</p>
<b>PAYMENT</b>	<p><b>Was there additional consideration paid/payable in relation to this property including any consideration for the parallel arrangement?</b> <i>(i.e. Any money to be given by the subsequent purchaser or an associate of the subsequent purchaser in order for the subsequent purchaser to obtain the transfer right (other than reimbursement of 'excluded costs') that exceeds the consideration to be given by the first purchaser (or the previous holder of the transfer right) )</i></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes, the details of the additional consideration are: .....</p> <p>.....</p>
<b>OPTIONS</b>	<p><b>Was there an option granted in relation to this property?</b> <i>(i.e. Was there some prior arrangement that required one party to enter into the contract with the other?)</i></p> <p><input type="checkbox"/> <b>No</b> (If "No" please check this box only, then go direct to the "Signature" section below.)</p> <p><input type="checkbox"/> <b>Yes</b>, the option was granted on this date: ...../...../.....</p> <p style="padding-left: 40px;">If "Yes", did any land development occur after the option date?</p> <p style="padding-left: 40px;"><input type="checkbox"/> No <input type="checkbox"/> Yes, the following land development to place after the option date: .....</p> <p>.....</p>

**FURTHER INFORMATION:**

.....

**Client signature:** X .....

**Print Full Name:** .....

**Date:** ...../...../.....