

PORTFOLIO EVIDENCE CHECKLIST

Conveyancing



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|--|--|--------------------------|--|
| Candidate name: | | Candidate number: | |
| Units: | <p>(FNCONV501B) Take instructions in relation to a transaction</p> <p>(FNCONV502B) Prepare and/or analyse and execute documents</p> <p>(FNCONV504B) Finalise conveyancing transactions</p> <p>(FNCONV601B) Obtain and analyse all information for the transaction</p> <p>(FNSICORG603B) Negotiate to achieve goals and manage disputes</p> | | |
| <p><u>Instructions</u></p> <p>To demonstrate you can undertake competency for the above units, your assessor will require you to submit two separate conveyancer client files, 1 for a vendor and 1 for a purchaser. To assist demonstrate your competency, it is expected you will choose files that are more complex in nature. They must be files you have completed and are familiar with, and you may be expected to discuss them during your interview.</p> <p>We appreciate that conveyancing files will not always contain all of the following documents, but try to include files that include as many of these documents as possible. If your submission does not contain everything an assessor requires, they will contact you to discuss what additional information they may need. If your file contains additional documents, add them to the bottom of the list and tick which files (vendor and/or purchaser) it applies to.</p> <p>Provide a brief summary (below) of each file to help explain the overall nature of the file and why you chose that particular file.</p> <p>Remember to submit this summary and checklist, and remove any information relating to privacy or intellectual property by striking or whiting it out from portfolio documentation.</p> | | | |
| <p><u>Candidate Declaration</u></p> <p>All portfolio evidence submitted as part of my VETASSESS conveyancer assessment is from a genuine conveyancing file, with work carried out by myself, and includes correspondence, facsimiles and documents to and from the client and solicitor/conveyancer on the opposite side of the transaction.</p> <p>Signed: _____ Date: _____</p> | | | |

Purchaser file summary:

Vendor file summary:

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| Purchaser file | Vendor file | Documents to include with each conveyancing file: |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Instruction sheet , detailing items such as: <ul style="list-style-type: none"> • vendor/purchaser details • terms and conditions including special conditions • price and dates • estate Agent details • details of other parties representative |
| <input type="checkbox"/> | <input type="checkbox"/> | Contractual documents including: <ul style="list-style-type: none"> • Contract Note • Contract of Sale • Vendor's Statement • Special conditions which may include: off-the-plan, owner builder, major domestic building contract and subdivisions, mortgagee's sale, restrictive covenant, contamination /environmental, s173 agreement, approval of planning permit including: off-the-plan, owner builder, major domestic building contract and subdivisions |
| <input type="checkbox"/> | <input type="checkbox"/> | GST |
| <input type="checkbox"/> | <input type="checkbox"/> | Goods Statement |
| <input type="checkbox"/> | <input type="checkbox"/> | Other documents relating to SRO requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | Requisition on Titles (and answers) |
| <input type="checkbox"/> | <input type="checkbox"/> | Transfer of Land (any format) |
| <input type="checkbox"/> | <input type="checkbox"/> | Licence agreement (if applicable) |
| <input type="checkbox"/> | <input type="checkbox"/> | Nomination documentation including Form 6A (if applicable) |
| <input type="checkbox"/> | <input type="checkbox"/> | Loan Approval |
| <input type="checkbox"/> | <input type="checkbox"/> | Adjustments, Settlement Statement and Cheque Distribution , showing a range of items such as: <ul style="list-style-type: none"> • land tax • pensioner remission • arrears of rates • mortgage and discharge • council and water rates • owners corporation fees & levies • rent • withdrawal of caveat |
| <input type="checkbox"/> | <input type="checkbox"/> | Notice of Acquisition |
| <input type="checkbox"/> | <input type="checkbox"/> | Notice of Disposition |

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|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Letter of Accounting |
| <input type="checkbox"/> | <input type="checkbox"/> | SRO and Land Titles requirements |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>A range of correspondence from the file (e.g. letters, emails, diary notes, faxes etc.) relating to:</p> <ul style="list-style-type: none"> • the client • the other party and their representative • relevant financial institutions (re: loans, mortgages etc.) • estate agents (re: deposits etc.) • booking settlement • cheque details |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Correspondence showing</p> <ul style="list-style-type: none"> • negotiations for a postponed settlement • a dispute |
| <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | |
| <input type="checkbox"/> | <input type="checkbox"/> | |

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|----------------------------|
| Candidate comments: |
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|---------------------------|
| Assessor comments: |
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Please include a copy of this completed summary and checklist with your application.