



List of Disclosure Documents to be Provided in Property Matters

Real Estate

- Appraisal/Valuation of all real estate; and
- A copy of any lease of any real estate or equipment.

Chattels

- Appraisal/Valuation of all chattels, including vehicles.

Bank Accounts

- Details of account numbers, passbooks and bank statements for the previous 12 months (if there is no dispute about balances a photocopy of your most recent statement for all accounts will be sufficient); and
- Details of Credit Union/Building Society or other like deposit passbook and statements for the previous 12 months.

Investments

- Details/Records of any investments, including stocks and shares.

Income

- Social Security pension or payment details;
- Details/Records of Long Service Leave accrued;
- Details/Records of overtime worked in previous 12 months; and
- Details of Income and current sources of income.

Insurance

- Details/Records of any life assurance or disability insurance including surrender values

Tax Returns

- 3 most recent taxation returns
- 3 most recent assessments; and
- Any business activity statements for the past 12 months

Superannuation

- Your last member benefit statement for all super funds in which you are a member; and
- If you are a member of a self-managed superannuation fund:
 - A copy of the trust deed; and
 - The 3 most recent financial statements for the fund

Businesses / Companies

- A copy of the financial statements for the 3 most recent financial years, including balance sheets, profit and loss accounts, depreciation schedules and taxation returns;
- A copy of the corporations most recent annual return that lists the directors and shareholders;
- If relevant, a copy of the corporations constitution; and
- Any business activity statements for the past 12 months.

Family Trusts

- A copy of the financial statements for the 3 most recent financial years, including balance sheets, profit and loss accounts, depreciation schedules and taxation returns;
- A copy of the trust deed; and
- Any business activity statements for the past 12 months.

Partnerships

- A copy of the financial statements for the 3 most recent financial years, including balance sheets, profit and loss accounts, depreciation schedules and taxation returns;
- A copy of the partnership agreement; and
- Any business activity statements for the past 12 months.

Personal

- Details/Records of any of the above re children;
- Medical or psychiatric reports; and
- Medical certificates