



ADDENDUM TO NB005 PROPERTY DESK

Client No:

Adviser (branch): CRM/Assistant: Split :
Adviser (Property Desk): CRM/Assistant: Split :

Client 1 (full name): Sex : Nationality / Passports:
Client 2 (full name): Sex : Nationality / Passports:
Property owner: Sex / Company / Trust:
first name middle name last name Nationality / Passports:

PROPERTY DETAILS

Address (full):
Purchase price: Currency:
Property use: [Personal residence](#) / [Family use](#) / [Rental \(Investment\)](#)
Rental Value: Rent frequency: [Weekly](#) / [Fortnightly](#) / [Monthly](#) / [Quarterly](#) / [Half Yearly](#) / [Yearly](#)

MORTGAGE DETAILS

New mortgage / Remortgage / Equity Release

Lender: Amount borrowed: Currency:
Interest Rate: Fixed or variable: Term of loan (in years):
Repayment amount: Repayment frequency: [Weekly](#) / [Fortnightly](#) / [Monthly](#)

PAYMENT DETAILS

Reservation deposit paid: Paid/Due on:
Balance deposit to pay: Paid/Due on:
Balance equity to pay: Paid/Due on:
Settlement expected by (approximate):



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COMMISSION DETAILS

Service provider: Service provided: New Business: Y / N

Percentage of commission expected from service provider: Commission due (trigger) by:

Based on price of:

Gross commission expected (in US\$):

Commission to be sacrificed (inUS\$): Sacrificed by (adviser name):

Total commission expected (in US\$):

Trail or staged commissions expected: Y / N Details:

PROPERTY DESK MANAGER CHECK

1	Client "Property Search Form" received from branch adviser	Y / N / NA
2	Copies of relevant emails and faxes received from branch adviser	Y / N / NA
3	Copies of Client notes showing property selections/discussions received from adviser	Y / N / NA
4	Copies of referral and confirmation from service provider received	Y / N / NA
5	Property desk disclaimer - buyer beware attached	Y / N / NA
6	Does the technical advice match the Clients expectations?	Y / N / NA

Property Desk Manager: _____

Signed:

Date: _____