SYDNEY PROPERTY VALUATION

Solicitor Valuation Instruction Checklist

Documents to prepare before instructing a valuer in a property, estate, family law or litigation matter

How to use this checklist. Work through it before you instruct a valuer, or share it with a client so they can gather what is needed. Most delays come from incomplete instructions, not the inspection itself. FOR SOLICITORS & CONVEYANCERS

Documents & details to prepare

PROPERTY & TITLE DETAILS

- [ ] Full property address
- [ ] Title reference, lot and plan number
- [ ] Recent title search showing registered proprietors
- [ ] Registered interests, easements or caveats

OWNERSHIP & PARTIES

- [ ] Names of the parties and their ownership shares
- [ ] Relationship between the parties
- [ ] Held as joint tenants or tenants in common

PURPOSE & LEGAL CONTEXT

- [ ] Matter type (family law / probate / litigation / transfer / stamp duty)
- [ ] Court, tribunal or revenue office the report is for
- [ ] Single-expert or party-appointed requirement
- [ ] Any expert-witness or court-format requirements

VALUATION DATE

- [ ] The date the valuation must reflect
- [ ] Current or retrospective valuation
- [ ] Trigger date — separation, death or acquisition

ACCESS ARRANGEMENTS

- [ ] Who occupies the property
- [ ] Contact for the occupant, agent or manager
- [ ] Any tenancy affecting inspection timing

SUPPORTING DOCUMENTS

- [ ] Most recent council rates notice
- [ ] Lease agreements for tenanted or commercial property
- [ ] Strata records and the latest levies notice
- [ ] Building plans, approvals and renovation records
- [ ] Any previous valuation reports or appraisals

Confirm these when you instruct the valuer

- [ ] Name of the client
- [ ] The property or asset being valued
- [ ] The purpose of the valuation
- [ ] The required valuation date
- [ ] Intended users of the report (court, ATO, revenue office)
- [ ] The legal, tax or estate context
- [ ] Any deadlines
- [ ] Any assumptions or known issues

Common mistakes to avoid

- Not stating the purpose of the valuation clearly
- Providing the wrong valuation date in a retrospective matter
- Forgetting lease documents for commercial or tenanted property
- Leaving access arrangements unconfirmed
- Relying on an informal appraisal where independent evidence is required

Acting in a matter that needs independent valuation evidence?

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Prepared by the Sydney Property Valuation Editorial Team. General information to assist preparation — not legal, tax, financial or valuation advice for a specific matter.