THE CHECKLIST

One page to share with your accountant.

Print it, tick it, or send it to your accountant and lawyer so everyone works from the same list.

- [ ] Every signed agreement found and read by your lawyer
- [ ] Notice period and exit terms confirmed
- [ ] Valuer agreed, and how the share is valued
- [ ] Tax worked out for both sides, before the price
- [ ] Price agreed, in writing
- [ ] Buyer's loan approved in writing
- [ ] Landlord and bank asked to release guarantees
- [ ] Insurance between partners reviewed
- [ ] Plan agreed for telling staff and patients
- [ ] What it touches at home flagged to your adviser

Network Family Office

We coordinate. You decide.

GET IN TOUCH

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General information, not advice.

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Shared by your accountant? They can reach us at hello@networkfamilyoffice.com.au