



# Transaction information form

State Revenue Office  
Department of Treasury and Finance

## Purpose of this form

This form is used to collect information about land transfers.

If you are lodging a paper transfer with the State Revenue Office (SRO) for assessment, you must provide this completed *Transaction Information Form* so that the transfer instrument can be assessed and stamped. If you are lodging electronically via Tasmanian Revenue Online the information gathered in this form can be used to complete the data requirements.

## IMPORTANT

The land transfer instrument cannot be stamped or endorsed for duty if the required transaction information is not provided.

## What you will need to complete this form

1. A signed and dated Transfer Instrument. A transfer instrument is a Land Titles Office document which is signed by the transferor/s which has the effect of transferring land or an interest in land.
2. A copy of the signed agreement for sale (if there was an agreement). If the transaction was agreed in a contract, you will need a copy of the agreement to complete this form. If you are lodging the transaction for assessment by the State Revenue Office, a copy of the agreement will also need to be lodged.
3. If you have a valuation of the property transferring you will need a copy of the valuation to complete this form. A copy of the valuation should also be provided to the State Revenue Office if you are lodging the transaction for assessment.
4. If the transaction is being aggregated with a prior transaction because they are both part of the same arrangement, you will need details about the prior transaction and any duty which has previously been paid.
5. If you are claiming an exemption or concession, you will need to know the relevant section of the *Duties Act 2001* for which the exemption or concession relates and, if the transaction is being assessed by the State Revenue Office, lodge any relevant evidence or application forms.

More information about dutiable transactions, evidence of value, aggregation, exemptions and concessions can be found at the State Revenue Office website at [www.sro.tas.gov.au/duty](http://www.sro.tas.gov.au/duty).

## 1. Transfer dealing number

LTO dealing number

The Land Titles Office dealing number can usually be found on the top right hand corner of the transfer instrument. Leave blank if a number has not yet been allocated.

## 2. Property information

Is the property (or any of the properties if more than one) a part PID transfer?

A *part PID (Property Identification number) transfer* occurs when only part of the land is transferring (for example if 300 m<sup>2</sup> is transferring of the total PID area of 700 m<sup>2</sup>), or where only one title of a multiple title PID is transferring.

- No** – please continue to question 3.  
 **Yes** – please provide the Volume/Folio of the property/ies and the area transferring below.

Volume/Folio	<input type="text"/>	Area (m <sup>2</sup> )	<input type="text"/>
Volume/Folio	<input type="text"/>	Area (m <sup>2</sup> )	<input type="text"/>

## 3. Subdivisions

Is this the first time the property (or properties if more than one) has transferred since a subdivision?

- No** – please continue to question 4.  
 **Yes** – please provide the current and former Volume/Folio number/s for the relevant property/ies.

Current Volume/Folio  Former Volume/Folio

Current Volume/Folio  Former Volume/Folio

## 4. Consolidations

Is this the first time the property (or properties if more than one) has transferred since being consolidated with another property or part of another property? A *consolidation* occurs when a new property is created due to the amalgamation of two or more prior titles.

- No** – please continue to question 5.  
 **Yes** – please provide the current and former Volume/Folio number/s for the relevant property/ies.

### Consolidation 1:

Current Volume/Folio  Former Volume/Folio

Former Volume/Folio

### Consolidation 2:

Current Volume/Folio  Former Volume/Folio

Former Volume/Folio

## 5. Transaction details

Contract date	<input type="text"/>	The date the contract or agreement was signed. Mark this field as 'N/A' if there was no contract signed.
Settlement date	<input type="text"/>	This is the date that the contract settled and payment for the property was made. Mark this field as 'N/A' if there was no settlement date.
Transfer date	<input type="text"/>	This is the date that the transfer occurred, and will be the date noted on the transfer instrument.
Date of possession/occupation	<input type="text"/>	This is only required if possession of the property took place prior to the transfer date. Mark as 'N/A' if not relevant to the transaction.

## 6. Open market details

Was the transaction undertaken on the open market?  **Yes** - Real estate agent  
 **Yes** - other (e.g. privately advertised)  
 **No**

If 'Yes', continue to **question 7**. Evidence that the transaction was open market may need to be provided. See the "[Evidence of Value](http://www.sro.tas.gov.au)" Public Ruling for details at [www.sro.tas.gov.au](http://www.sro.tas.gov.au).

Do you have a valuation?  **No**  **Yes**

If 'Yes', complete the below valuation questions. The valuation should be undertaken by a registered valuer and be within 3 months of the date of the contract for sale or transfer of land. A copy of the valuation will need to be attached with your lodgement with the SRO or retained on file if endorsed on TRO.

Market value per valuation \$

Valuer's name

## 7. Consideration details

Contract consideration (sale price)	\$ <input type="text"/>	This is the sale price listed in the contract or agreement for sale. If GST is payable, the value entered here should include the value of GST.
Non-monetary consideration	\$ <input type="text"/>	This is the value (or money's worth) of consideration not being paid in money. For example, the value of any goods or services being exchanged instead of paying money.
Total consideration (including GST)	\$ <input type="text"/>	This is the total of all monetary (money) and non-monetary consideration being paid for the transfer, including any GST (if GST is applicable).
GST payable	\$ <input type="text"/>	If GST is payable, enter the value of the GST payable. If GST is not payable mark this field as 'Nil'. If the amount of GST is unknown (or under the margin scheme) mark as 'Unknown'.

Does the GST margin scheme apply?  **No**  **Yes**

If you are unsure whether the GST margin scheme applies to the transaction, answer 'No' to this question.

If non-monetary consideration was paid, please provide a brief description of the non-monetary consideration:


**8. Apportionment of purchase price (business transactions only)**

This section is for business purchases only. Please continue to **question 9** if the transaction is not business related.

Land, buildings and fixtures	\$	
Plant and equipment	\$	
Other dutiable goods (chattels)	\$	
Registered motor vehicles	\$	
Stock in trade and materials held for use in (excluding livestock)	\$	
Livestock	\$	
Water allocations/licenses	\$	
Business goodwill and intellectual property	\$	
Other non-dutiable goods	\$	
Total	\$	

The total of the apportioned purchase price should be equal to the total consideration identified in question 7.

**9. New buildings**

Does the property (or properties if more than one) have a new house or building constructed on it?

*A new house or building means a building that has not been occupied at any stage prior to the transfer.*

- No** – please continue to question 10.
- Yes** – please provide the Volume/Folio number/s of the relevant property/ies below.

Volume/Folio

Volume/Folio

**10. Off-the-plan purchases**

Does the property (or properties if more than one) relate to an off-the-plan purchase.

- No** – please continue to question 11.
- Yes** – please provide the Volume/Folio number/s of the relevant property/ies below.

Volume/Folio

Volume/Folio

**11. Aggregated transactions**

Is this transaction aggregated with an earlier transaction on the basis that both transactions substantially form part of the same arrangement?

- No** – please continue to question 12.
- Yes** – please complete the below details about the prior transaction.

Prior transaction reference number	<input style="width: 95%; height: 25px;" type="text"/>	This is the State Revenue Office reference number, or endorsement number, or the Land Titles Office dealing number applied to the previous transaction.
Duty paid on aggregated prior transaction	<input style="width: 95%; height: 25px;" type="text"/> \$	This is the amount of duty that was paid (if any) on the prior transaction.

**12. Exemptions and concessions**

Are you claiming an exemption or concession for this transaction?

- No** – please continue to question 13.
- Yes** – please provide details of the exemption/concession being applied for below.

What concession or exemption is being claimed  Please provide the section number of the Duties Act or brief description of the exemption or concession being applied for.

Have you attached the required evidence or application form?  No  Yes

Many exemptions/concessions require an application form or supporting evidence. Please see the '[Documentary Evidence Requirements](#)' guideline for more information. The guideline is available at [www.sro.tas.gov.au](http://www.sro.tas.gov.au).

### 13. Nominated contact

This must be a transferee (purchaser) who is liable or jointly liable for any duty payable on the transaction.

The contact information will be used for any duty assessment relating to this transaction, and as the nominated contact for land tax purposes in relation to the property/ies.

Account contact name			
Phone or Mobile number			
Email			
Address line 1			
Address line 2			
Suburb			
State		Postcode	
Country			

- Please select your preferred method of contact
- Email
- Post
- Phone

### 14. Land tax

Please provide information in the table below about the percentage of property transferring and intended future use of the property.

#### Percentage of property transferring

This is the total percentage interest in the property transferring. *For example, if there are two purchasers, and each purchaser is receiving a 25 per cent interest, then the percentage of property transferring would be 50 per cent.*

#### Future land use

This is the intended use of the land at the following 1 July. Options are:

- Principal Residence Land (PRL) - land used as the principal residence of an owner (50% or more).\*
- Primary Production Land (PPL) - land used for the business of primary production.\*
- General (Gen) - land which is not principal residence land or primary production land.

	Volume/Folio number	Percentage of property transferring	Future land use	
			Land use code (Gen/PRL/PPL)	Land use effective date
Property 1				
Property 2				
Property 3				
Property 4				
Property 5				

\*PRL may be applied in additional circumstances. PPL requires several conditions to be met. For more information about PRL and PPL, see the [Land Tax Guideline](#) available from [www.sro.tas.gov.au](http://www.sro.tas.gov.au).

**15. Land tax - continued**

Do all of the properties listed in the table in question 14 have an intended land use code of General (Gen)?

- No** – please continue to question 16.
- Yes** – No further information required.

**16. Land tax - Primary Production Land (PPL)**

Do any of the properties listed in the table in question 14 have an intended land use code of Primary Production Land (PPL)?

- No** – please continue to question 17.
- Yes** – A “[Primary Production Land Classification Application](#)” must be completed and lodged with the State Revenue Office for the PPL classification to be assessed.

**17. Land tax - Principal Residence Land (PRL)**

Do any of the properties listed in the table in question 14 have an intended land use code of Principal Residence Land (PRL)?

- No** – No further information required.
- Yes** – please continue to question 18.

**18. Land tax - Principal Residence Land (PRL)**

Will an owner/s of the land with at least a 50% interest in the property be residing at the property as their principal residence as at the next 1 July?

*For more information about what constitutes ‘principal residence’ see the “[Land Tax Guideline](#)” available from [www.sro.tas.gov.au](http://www.sro.tas.gov.au).*

- No** – A “[Principal Residence Land Classification Application](#)” must be completed and lodged with the State Revenue Office for the PRL classification to be assessed in circumstances where an owner/s of at least a 50% interest will not be residing at the property.
- Yes** – please continue to question 19.

**19. Land tax - Principal Residence Land (PRL)**

Will the property/ies be used for principal residence purposes and other purposes (for example, renting part of the property or using part of the property for a home business)?

- Yes** – A “[Principal Residence Land Classification Application](#)” must be completed and lodged with the State Revenue Office for the PRL classification to be assessed.
- No** – Please complete the table below with the details of owners intending to reside at the relevant property/ies as at the next 1 July.

	<b>Volume/Folio number</b>	<b>First name and Surname of owners intending to reside at the property as at the next 1 July</b>
Property 1		1.
		2.
		3.
Property 2		1.
		2.
		3.
Property 3		1.
		2.
		3.
Property 4		1.
		2.
		3.
Property 5		1.
		2.
		3.



## To contact the State Revenue Office

### Email

dutyhelp@treasury.tas.gov.au

### Phone

(03) 6166 4400 weekdays, 9:00 am to 5:00 pm (option 4 then 3)

1800 001 388

### Mail

The Commissioner of State Revenue

GPO Box 1374, Hobart, TAS 7001

### Fax

(03) 6173 0217

### In person

Ground floor

Salamanca Building Parliament Square

4 Salamanca Place HOBART TAS 7000

weekdays, 9:00 am to 5:00 pm

### Personal Information Protection Statement

Personal information is collected by the Commissioner of State Revenue and used for the purpose of administering the Taxation Administration Act 1997. You are required to provide this information under the relevant provisions of that Act.

Your personal information may only be disclosed in accordance with the provision of the Taxation Act, and will be managed in accordance with the Personal Information Protection Act 2004. You may access your personal information on request to the Commissioner of State Revenue. A fee may be charged for this service.