# Form 2 Regulation 14(b)

# *Disclosure of client to non-independent service provider*

***Conveyancers Act 2006* Section 49(3)**

## Part 1 – About this form

A conveyancer who intends to refer a client or a prospective client to a service provider who is not independent of the conveyancer, must disclose the referral arrangement by completing this form and giving it to the client or a prospective client.

A service provider is not independent of a conveyancer if the conveyancer—

1. receives a rebate, discount, commission or benefit for referring a client to the service provider; or
2. has a personal or commercial relationship with the service provider.

This form must be completed and signed before a conveyancer makes the referral regardless of whether this is before or at the time the conveyancer is retained or while the conveyancer is acting for the client.

## Part 2 – Disclosure of referral

|  |  |
| --- | --- |
| Good/service to which referral relates |  |
| Name of service provider |  |
| **Note:** A service provider provides a service for a conveyancing transaction. Examples include a building inspector, pest inspector, valuer, surveyor, insurer, mortgage originator, mortgage broker, law practice or another licensee. |
| Service provider’s relationship with conveyancer | Personal |  |
| Commercial |  |
| **Note**: A personal or commercial relationship includes a family relationship, a business relationship, a fiduciary relationship and a relationship in which one person is accustomed, or obliged, to act in accordance with the directions, instructions or wishes of the other person. |
| Type of referral fee(if applicable) | Rebate |  |
| Discount |  |
| Commission |  |
| Benefit – specify |  |
| Other – specify |  |
| Intentionally blank - ignore |
| Amount of referral fee ($) |  |
| Intentionally blank - ignore |
| Is the referral fee part of a repeat referral arrangement? | Yes |  |
| No |  |
| Signature of conveyancer |  | Date |  |
| Signature of client |  | Date |  |