



Property Services Unit

4

APPLICATION TO PURCHASE

Fill in this form to commence the process to purchase real estate (property).

Please remember that all property is held in the name of the Uniting Church in Australia Property Trust (W.A.). Property dealings are to be undertaken in accordance with Section 4 of the UCA regulations and Part 4 of the By-laws of the UCA Synod of Western Australia.

This form is to be:

- Completed after completion of your Mission and Strategy Plan.
- Completed by congregations and agencies seeking approval to purchase property.
- Forwarded to Property Services Unit by the Congregation or Agency as applicable.

.....

SECTION A: APPLICANT AND PROJECT DETAILS

1. BENEFICIAL USER

Congregation*			
Contact Person Rev / Dr / Mr / Mrs / Ms / Miss			
Position			
Email			
Phone	BH		Mobile
Address (Postal)			
* Organisation name if not a Congregation			

2. PROPERTY LOCATION AND DESCRIPTION

Type of property to be purchased	
Description of property, including assessment of overall condition	
Address (Street)	

3. PROPERTY VALUATION	
Proposed purchase price	\$ _____ GST inclusive <input type="checkbox"/> / exclusive <input type="checkbox"/>
Market valuation of property	
Who provided the market valuation	
Valuation Date	
Proposed terms of purchase	

4. PROPERTY DETAILS			
Dimensions of Land	Frontage	Depth	Area
Title Particulars	Volume	Folio	
Zoning			
Is the property registered / classified / identified as a heritage property? If yes, please provide details.			
Site plan and photographs and vendors statement: Please attach a site plan showing whole of site and giving position of buildings including a copy of Section 32 Vendors Statement.			

5. REASON FOR PURCHASE
Please advise briefly the reason for seeking to purchase this property including how it fits in with you Mission and Strategy Plan

6. PROPERTY UNDER OVERSIGHT OF APPLICANT
Please list all property under the oversight of the applicant. (eg manses, churches, vacant land, shops etc)

7. PREFERRED METHOD OF FUNDING AND REPAYMENT OF LOANS Please include business plan	

SECTION B: CURRENT FINANCIAL POSITION AND PROJECT BUDGET
Please include your business plan

7. CURRENT FINANCIAL POSITION	
a) DEPOSITS AND INVESTMENTS	\$
UCA Cash Management Fund	
UCA Growth Fund	
Trusts and Bequests	
Bank	
Other investments (please specify)	
TOTAL	
b) LOAN LIABILITIES	\$
Investment Fund	
Synod	
Bank	
Other (please specify)	
TOTAL	

8. AVAILABLE FUNDS FOR PROJECT FUNDING		
SOURCE		\$
Funds: UCA Funds Management		
Funds: Bank		
Fund raising (Refer 9A)	To be raised:	
Embargoed Funds* <small>* Net of costs and Mission & Service (BOMAR) allocation. (Refer 9B)</small>	Applied for:	
	Approved:	
Investment Fund Loan (Refer 9C)	Applied for:	
	Approved:	
Other Loans (Refer 9D)	Applied for:	
	Approved:	
Other funding (Refer 9E)		
TOTAL AVAILABLE FUNDING		

TOTAL PROJECT COST (Including GST if applicable)	
EXCESS FUNDING / (SHORTFALL in FUNDING)	

9. ADDITIONAL INFORMATION REGARDING PROJECT FUNDING (if applicable)
A. Fund Raising: Please specify plans for fund raising.
B. Embargoed Funds: Please advise details of property sold and available proceeds. Please also advise whether an application for the allocation of Embargoed funds has been submitted and/or approved.
C. Investment Fund Loan: Please advise details to include type of Loan, and whether a loan application has been submitted and approved or whether the application is to be submitted.
D. Other Loans: Please advise details to include type of Loan, and whether a loan application has been submitted and approved or whether the application is to be submitted.
E. Other funding: Please specify source of other funding.

SECTION C: APPROVALS

CONGREGATION / AGENCY BOARD APPROVAL

Name of Congregation/Organisation:	
Certified Copy of Resolution: We hereby certify that at a meeting ofduly convened in accordance with Assembly Regulations 4.4.3 and 4.4.4 held on theday of 20....., the attached resolutions were duly passed.(Attach copy of resolutions).	
The voting was: FOR AGAINST ABSTAINING PRESENT	
Please attach a copy of the relevant minute	
Signed:	Signed:
Date:	Date:
Name:	Name:
Position:	Position:

SYNOD / PRESBYTERY OFFICE USE ONLY

Application Reference Number	#
Presbytery Mission Planner Approval	<input type="checkbox"/> Yes <input type="checkbox"/> No
Presbytery Property Committee and Resources Commission Approval	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX: FURTHER INFORMATION

FUNDING

Where **embargoed funds** or a UCIF loan are required to fund the project, separate applications must also be completed and sent to UCIF.

CONTRACTS

Once an application has been approved, ALL contracts must be signed by the Property Officer of the 'Uniting Church in Australia Property Trust (W.A.)'. This is the legal entity of the church and only Trust members have the authority to sign legally binding documents on behalf of the church.

Please ensure that any contracts are completed with the owner shown as the Uniting Church in Australia Property Trust (W.A.), as noted above, and are sent for signing to Property Services Unit at GPO Box M952, Perth WA 6843.

PRACTICAL MATTERS

1. Congregation submits the application to purchase to the Property Services Unit.
2. Property Manager will access advice from the Mission Planner that the proposal is closely aligned to the congregation's mission plan, before it is forwarded to the Presbytery Property Committee for review.
3. The Presbytery Property Committee will make its recommendation to the Resources Commission to approve the purchase subject to satisfying the Committee that the purchase will enhance the mission of the congregation and the ability to repay a loan if required.
4. Purchases shall be made in the name of the Uniting Church in Australia Property Trust (W.A.) [Reg. 4.6.3].
5. Congregations submit the offer to purchase to the Property Manager for execution by the Property Officer on behalf of the Property Trust.
6. For further advice on completing the form please contact the Property Services Unit on 9260 9800 or 1300 736 692.

PROPERTY PURCHASE CHECK LIST

1. **Request from Church Council** (Reg 4.6.3, By Laws 4.1.4, 4.1.5)
 - 1.1 Congregational meeting necessary where major property changes (By-Law 4.1.50).
2. **Valuation details of Purchase proposal.**
3. **Financial requirements:** (By –Law 4.1.5)
 - 3.1 Congregation budget and financial statement
 - 3.2 Costing of total project (Purchase)
 - 3.3 Funds statement for proposal
4. **Design and constructing formalities** (By –Law 4.1.5)
 - 4.1 Design plans
 - 4.2 Site plan
 - 4.3 Locality map
 - 4.4 Town planning requirements
 - 4.5 Council approval
 - 4.6 Any other Statutory requirements
5. **Properties**
 - 5.1 List of existing properties for which Congregation is responsible.
6. Purchase/development approval application including Congregation resolution to be forwarded to Presbytery Property Committee for review and recommendation to the Resources Commission.
7. Release of funds. Separate application must be made for approval to draw from property sale proceeds.
8. Settlements will be handled by Synod Staff.
9. Contract documentation must be forwarded for signing by the Property Officer on behalf of the Uniting Church in Australia Property Trust (W.A.) at GPO Box M952 Perth 6843 (Ref.4.7.1-4, By-Law 4.1.11).