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PROPERTY DECISION REVIEW REPORT

PROPERTY BUYER — PRELIMINARY REVIEW



Property	10 Example Street, Exampleton VIC 3000
Client	Alex and Jordan Sample
Decision	Shortlisted purchase with future rear and upper-level intentions
Report reference	PF-SAMPLE-PR-001
Date of issue	21 July 2026
Status	FINAL — FICTIONAL SAMPLE

Sample

Fictional sample
All names, property details, planning controls, findings and source references in this document are illustrative. This sample demonstrates report structure and wording only. It must not be relied upon for any real property or project decision.

Prepared and approved by

Shawn Song | Preforma

Preforma provides preliminary, information-based property decision support. It does not provide architectural or building design, formal planning advice, building inspection, engineering, legal advice, valuation or construction costing.

1 Executive Decision Summary

Overall preliminary position and principal reasons

Property and decision reviewed

The clients are considering the purchase of a compact single-storey dwelling on an illustrative 268 m² residential lot. They wish to understand whether the property appears broadly compatible with immediate family occupation and whether a future rear or upper-level addition remains worth investigating.

Overall preliminary position

Potentially compatible, subject to identified investigations

The property appears capable of meeting most immediate accommodation needs and retains broad potential for later adaptation. The reviewed height control does not appear to exclude a conventional two-storey direction by itself. However, the narrow lot, side and rear interfaces, retained open-space priorities, neighbouring amenity, unknown structural capacity and incomplete approval history may materially influence the eventual scope.

Principal reasons

Assessment area	Findings	Preliminary position
Supports the decision	V-01 / V-02	Existing accommodation and rear outdoor area appear aligned with immediate family needs.
Practical opportunity	T-01	The property may allow occupation first and a staged investigation pathway before detailed design.
Apparent potential	P-01	A rear or upper-level direction remains worth investigating; no obvious prohibition has been identified from the selected controls reviewed.
Material constraints	C-01 / C-02	Setbacks, retained open space and neighbouring interfaces may constrain the scale and location of future work.
Key risks and dependencies	R-01 / D-01 / D-02	Overshadowing, existing-building capacity and reliable survey information require later testing.
Material uncertainty	G-01 / G-02 / U-01	Title, condition information and the approval status of apparent previous work remain unavailable or unresolved.

Immediate next actions

- Obtain current title, plan and legal review before relying on the apparent property potential.
- Obtain an independent building and pest inspection before an unconditional purchase commitment.
- Obtain relevant council property records to clarify apparent previous rear work.
- If the purchase proceeds, obtain survey and measured information before spatial, setback or shadow testing.
- Appoint an appropriately qualified design professional only after the priority information gaps are resolved.

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2 Property and Information Context

Factual property and evidence baseline

Item	Information used in this fictional sample
Property / review	10 Example Street, Exampleton VIC 3000 — Preliminary Review for a property buyer
Property type	Illustrative single-storey detached weatherboard dwelling; residential use
Lot information	Approximately 268 m² and 7.8 m frontage; all dimensions unverified
Existing accommodation	Three bedrooms, one bathroom, combined living/dining, rear kitchen and laundry
Illustrative planning context	General Residential Zone; no overlay identified in the illustrative public report
Preliminary pathway	Clause 54 appears relevant for this illustrative under-300 m² lot; not confirmed with council
Observation / cut-off	No site observation included; information cut-off 21 July 2026

Information available for the review

Status	Information	Source status
Reviewed	Client questionnaire and wish-list	Client-provided
Reviewed	Listing, sales floor plan and photographs	Marketing; indicative only
Reviewed	Illustrative Planning Property Report, selected provisions and public imagery	Public information; sample data
Not reviewed	Current title, plan and council property records	Material information gaps
Not reviewed	Building, pest, structural, services or drainage information	Material information gaps
Not reviewed	Feature and level survey or measured drawings	Required for later testing

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3 Client Objectives and Intentions

Decision, priorities and outcomes being considered

Objective area	Client position
Immediate use	Move in without major immediate construction; retain three bedrooms and a usable garden.
Longer-term intention	Explore additional family living space and potentially one additional bedroom or retreat.
Project direction	Client is open to a rear addition, upper-level addition or staged adaptation, but has not selected a preferred solution.
Budget context	Indicative future project budget of $550,000 including contingency; not independently tested.
Timing	Purchase decision within two weeks; major work may be deferred for two to five years.
Priority trade-offs	Retain meaningful outdoor space; avoid disproportionate cost; accept staged delivery if needed.

Agreed questions: Is the property broadly compatible with the clients' needs; does a rear or upper-level direction remain worth investigating; what may influence the future scope; what should be confirmed before further commitment; and which professional pathways may be required?

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4 Preliminary Assessment: Relevant Considerations

Principal findings and selected planning, property, building and project matters

How to read this assessment

The findings below are preliminary and directional. “Potential” means worth further investigation; it does not confirm feasibility, compliance, approval, structural suitability, cost or what can be built. Official A-series references appear in the final column for later checking.

4.1 Preliminary Assessment Overview

Finding	Class	Matter	Preliminary position	Significance	Status
V-01	Current value	Existing accommodation	Meets most immediate accommodation needs	Moderate	Supplied information
V-02	Current value	Rear outdoor area	Provides present lifestyle value and future flexibility	Moderate	Indicative
T-01	Opportunity	Staged pathway	Occupation first and later investigation may be practical	Moderate	Preliminary
P-01	Potential	Rear / upper-level direction	Remains worth investigating; no obvious exclusion identified	Moderate	Preliminary
C-01	Constraint	Side and rear interfaces	May limit the extent of upper-level work	High	Preliminary
C-02	Constraint	Retained open space	May limit ground-level expansion	High	Preliminary
R-01	Risk	Overshadowing	Future upper-level work may affect adjoining open space	High	Untested
D-01	Dependency	Survey and measured information	Required before reliable dimensional testing	High	Unavailable
G-01	Gap	Title and plan	Restrictions or easements may alter the assessment	High	Not reviewed
U-01	Unresolved	Previous rear alteration	Approval status remains unresolved	High	Unconfirmed

4.2 Selected residential development considerations

Finding	Consideration	Preliminary interpretation	Directional effect	Reference
P-01	Building height	A conventional two-storey direction is not excluded by height alone.	Not presently the primary constraint	A2-2
C-01	Side and rear setbacks	Increasing wall height may require greater separation from boundaries.	May constrain upper-level extent	A2-3
C-02	Site coverage / private open space	A substantial ground-level footprint may reduce retained outdoor area.	May influence project direction	A2-5 / A3-2
R-01	Overshadowing secluded open space	The apparent orientation indicates a potential winter amenity impact.	Requires later testing	A4-3
C-03	Overlooking	Future elevated windows may require careful placement or screening.	Potentially manageable	A4-4
D-01	Permeability	Future footprint and paving may affect drainage and permeable area.	Later calculation required	A5-1

Integrated preliminary position

Taken together, the reviewed information indicates that the property remains potentially compatible with the clients’ intentions. Existing accommodation and the ability to defer major work support the purchase decision. A rear or upper-level direction remains worth investigating, but the narrow lot, retained open-space priorities, neighbouring amenity, structural unknowns and incomplete property records may materially influence the eventual scope and level of compromise.

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5 Preliminary Assessment: Current Value, Opportunities and Apparent Potential

What presently supports the decision and may warrant further exploration

This section identifies positive property characteristics and decision pathways relevant to the clients' objectives. Apparent potential is conditional and has not been tested through design, survey, planning assessment, engineering or project-specific costing.

V-01
VALUE

Existing accommodation supports immediate use

Based on the supplied sales information, the dwelling appears to provide three bedrooms and the principal living functions required for the clients' immediate occupation. This may reduce the need for urgent major work and allow the clients to investigate future changes more deliberately.

Directional effect: Supports occupation without immediate major work.

Current limitation: The condition, dimensions, comfort and suitability of the existing spaces have not been independently verified.

V-02
VALUE

Rear outdoor area provides present value

The existing rear open area appears relevant to the clients' priorities for family use, pets and retained outdoor space. Preserving a meaningful portion of this area may remain important when future project directions are considered.

Directional effect: Supports lifestyle needs and future flexibility.

Current limitation: The area has not been surveyed and should not be assumed to be fully available for future building work.

T-01
OPPORTUNITY

Staged occupation and investigation pathway

Subject to condition and suitability, the property may allow the clients to occupy first and defer major intervention while title, approval history, planning considerations, structural capacity and budget are investigated. This could reduce pressure to select a physical solution before reliable information is available.

Directional effect: Supports a more controlled commitment sequence.

Current limitation: The opportunity depends on the results of the recommended building, title and authority investigations.

P-01
POTENTIAL

Rear or upper-level direction remains worth investigating

The selected planning and property information reviewed does not presently identify an obvious reason to exclude a future rear or upper-level addition from further investigation. The overall height control does not appear to be the principal limitation by itself. Side and rear interfaces, retained open space, neighbouring amenity, the existing structure and cost may have a stronger influence on the eventual outcome.

Directional effect: Worth further professional investigation.

Current limitation: No footprint, layout, building form, height, setbacks, overlooking, overshadowing, structure, cost or approval outcome has been designed or formally tested.

Positive assessment position

The property appears to provide meaningful current value and retains broad future flexibility. These positive findings justify further investigation, but they must be considered together with the constraints, risks, dependencies and uncertainties in Sections 6 and 7.

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6 Preliminary Assessment: Constraints and Risks

Matters that may limit, complicate or materially affect the clients' intentions

A constraint is a known or apparent limiting condition. A risk is an uncertain matter that could result in an adverse consequence. A dependency must be resolved before a later decision can reliably proceed.

C-01
CONSTRAINT

Side and rear interfaces may constrain upper-level extent

Applicable side and rear setback considerations generally become more demanding as proposed wall height increases. Based on the apparent lot width and neighbouring relationships, these interfaces may influence the location and extent of future upper-level work more than the overall maximum building-height control.

Directional effect: May require reduced extent, increased separation or another later design response.

Current limitation: No verified title survey, proposed wall height or defined building form has been reviewed.

C-02
CONSTRAINT

Retained open space may limit ground-level expansion

The rear area provides current lifestyle value but may also limit the extent of future ground-level work. Site coverage, private open space, permeability, drainage and the clients' preference to retain a useful garden will need to be balanced at a later design stage.

Directional effect: May favour a smaller footprint, staging or greater compromise.

Current limitation: No qualifying areas or proposed footprint have been calculated or tested.

R-01
RISK

Potential overshadowing of adjoining open space

Based on the apparent orientation and relationship to the adjoining southern open-space area, future upper-level work may create a material winter overshadowing consideration. This could influence later height, setback, location or extent even where the maximum overall height appears manageable.

Directional effect: Could materially influence the eventual project scope.

Current limitation: No surveyed levels, neighbouring dimensions, defined building form or shadow modelling have been reviewed.

R-02
RISK

Scope and budget may require adjustment

The clients' indicative future budget of $550,000 has not been tested against a defined scope, existing-condition information, design or current project-specific cost advice. Planning, structural, access, services and condition matters could require additional contingency or staged delivery.

Directional effect: Could require reduced scope, staging or additional contingency.

Current limitation: Preforma does not provide construction costing or quantity-surveying advice.

D-01
DEPENDENCY

Verified survey and measured information

Reliable testing of setbacks, private open space, site coverage, height, overlooking and overshadowing depends on accurate boundaries, levels and measured-building information.

Directional effect: Must be obtained before reliable design or formal assessment.

Current limitation: Current dimensions are indicative only and must not be treated as survey information.

D-02
DEPENDENCY

Existing structural understanding

Any reliance on upper-level or substantial alteration potential depends on later investigation of the existing foundations, walls, roof structure and relevant building condition.

Directional effect: Must be resolved before relying on upper-level potential.

Current limitation: Structural suitability has not been assessed and must not be inferred from the apparent construction type or age.

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7 Preliminary Assessment: Information Gaps and Unresolved Matters

What remains uncertain and could change the preliminary position

The following matters are material because they could change the purchase decision, the apparent potential, the relevance of identified constraints or the sequence of later work.

Ref.	Information gap	Current position	Why it matters	Change assessment?	Resolution
G-01	Current title and plan	Not reviewed	May contain easements, covenants or restrictions affecting future intentions.	Yes	Conveyancer or solicitor review
G-02	Building and pest condition	No independent inspection reviewed	Could affect purchase risk, retention, scope and budget.	Yes	Independent building and pest inspection
G-03	Verified boundaries, dimensions and levels	Sales and public information only	Limits reliable setback, height, open-space and amenity screening.	Yes	Title / feature survey and measured information
G-04	Council property records	Not reviewed	May clarify the documented history and approval status of existing work.	Yes	Council property file and permit records
G-05	Services and drainage	No reliable information reviewed	May affect footprint, excavation, wet-area relocation and cost.	Possibly	Authority information and later specialist input

Unresolved matters

Ref.	Matter	Available indication	Potential effect	Resolution
U-01	Apparent previous rear alteration	The sales plan and photographs suggest previous rear work, but no approval records were reviewed.	Could affect reliance on current conditions and future planning.	Obtain council records.
U-02	Final approval pathway	Clause 54 appears relevant in this illustrative case, but the final pathway depends on verified property information and the eventual proposal.	May change which standards and authorities formally apply.	Confirm before detailed design.
U-03	Competing project priorities	Additional internal area and retention of a meaningful garden may require different levels of compromise.	May affect which broad direction should be tested first.	Clarify priorities before design appointment.

Matters capable of changing the preliminary position

- Title, boundaries, approval history or the applicable pathway differ materially from current assumptions.
- Building condition or structural advice identifies significant limitations.
- Neighbouring amenity impacts are greater than presently apparent.
- The clients' priorities, scope, budget or timing change materially.

Effect of uncertainty

The property remains potentially compatible, subject to the identified gaps and unresolved matters. This is not confirmation of feasibility, compliance, approval, structural suitability, cost or what can be built.

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8 Recommended Action and Decision Pathway

Prioritised investigations, professional pathways and decision sequence

Clarify, Verify, Investigate and Evaluate

- Clarify the relative priority of retained garden, additional area, budget, staging and timing.
- Verify title, legal restrictions, approval history and the applicable planning pathway.
- Investigate physical condition, measured information and later structural and cost matters.
- Evaluate whether to proceed, reduce or stage the scope, pause, or consider alternatives.

Prioritised decision sequence

Step	Action	Purpose	Category	Decision enabled	Findings
1	Title and contract review	Confirm legal restrictions and purchase protections.	Conveyancer / solicitor	Proceed, pause or seek protection	G-01
2	Building and pest inspection	Understand physical-condition risk.	Independent inspectors	Proceed, renegotiate or reconsider	G-02 / R-02
3	Council property records	Clarify apparent previous rear work.	Council / authorised service	Reliance on existing conditions	G-04 / U-01
4	Review findings against priorities	Test whether the property remains compatible.	Client	Proceed, reduce scope or reconsider	All material findings
5	Survey and measured information	Create a reliable basis for later testing.	Licensed surveyor / measured-building provider	Design appointment and dimensional testing	D-01 / G-03
6	Appoint design professional if proceeding	Develop and test actual spatial and design responses.	Registered architect or appropriately registered building designer	Future project direction	P-01 / C-01 / C-02
7	Structural and project-specific cost input	Test practical implementation and budget.	Engineer / quantity surveyor or cost consultant	Major project commitment	D-02 / R-02

Suggested professional pathway

The likely sequence is: conveyancer or solicitor and independent building/pest inspectors before purchase commitment; council or planning confirmation and a licensed surveyor before reliable design testing; then an appropriately registered architect or building designer, building surveyor, structural engineer and project-specific cost adviser as the project becomes sufficiently defined.

Closing decision position

Proceed to the next investigation stage, with priority given to title review, condition inspection and council property records. The property remains potentially compatible, but the clients should not rely more heavily on the apparent future potential until those matters are resolved. This is not a recommendation to purchase.

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9 Sources, Assumptions and Limitations

Evidence trail, reliance and service boundaries

9.1 Source register

ID	Source	Provider	Date	Status	Used for
S-01	Client questionnaire and wish-list	Client	20 July 2026	Client-provided	Objectives, timing and budget context
S-02	Real-estate listing and sales floor plan	Selling agent	20 July 2026	Marketing; indicative only	Existing accommodation and approximate configuration
S-03	Property photographs	Selling agent	20 July 2026	Marketing; limited visibility	Broad context and apparent previous rear work
S-04	Illustrative Planning Property Report	Public source — fictional sample	21 July 2026	Official-format sample only	Illustrative zone and pathway context
S-05	Selected Clause 54 standards	Victorian Planning Provisions	21 July 2026	Public regulatory source	Preliminary planning screening

9.2 Principal assumptions

Assumption	Treatment in this review
Lot area and dimensions	The reported 268 m² lot area and dimensions are illustrative and unverified.
Sales floor plan	Treated as indicative only and not suitable for design or dimensional reliance.
Existing work	No previous work has been assumed approved or compliant.
Planning pathway	Clause 54 has been treated as preliminarily relevant for this fictional under-300 m² example; final applicability is not confirmed.
Condition	No conclusion is made about safety, defects, structural capacity or suitability for occupation.

9.3 Preliminary service boundary

This preliminary, information-based review brings together the clients' objectives, available property information and selected public sources to identify values, opportunities, potential, constraints, risks, dependencies, information gaps, unresolved matters and next steps.

It is not a building or pest inspection, design, engineering, legal, valuation, costing or formal planning service. It does not confirm feasibility, compliance, approval, value, cost or outcome.

9.4. Reliance and final issue

This fictional sample is not for property reliance. A client report is prepared for the named client and agreed decision purpose using information available at the cut-off date. Material third-party information should be independently verified.

A Preforma report is issued once as Final. Revision rounds, updates and amendments are not included. New information, changed requirements or further assessment requires a separate engagement. Administrative or production corrections do not constitute reassessment.

9.5. Provider identification

Preforma may identify providers it considers suitable having regard to discipline, registration, experience, location, availability, service quality and relevance. Clients remain free to appoint any appropriately qualified provider.

Fictional sample notice

This document is an illustrative sample only. Every property, source, planning reference, assessment and conclusion must be independently completed and verified for an actual engagement.

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