

Valufield

SAMPLE

VALUFIELD RESOURCES · A PRACTICAL GUIDE

The private-work playbook

winning solicitor, accountant and private work

A practical guide for Australian valuation firms that want more family law, estate, tax, SMSF and stamp duty work. Every number is cited to its source, and the last pages say plainly what Valufield does and does not do.

FOR	PAGES	SOURCES	EXAMPLES
Principals of small and mid-sized firms	9, including this cover	15 references, listed on the last page	Use a fictional firm

SAMPLE Prepared by Valufield as a sample. Not a valuation. Not legal advice. Fictional firm, people and property

BEFORE YOU START

Private work pays more. Winning it is a system, not luck.

For principals of small and mid-sized valuation firms who want more private and legal work. Practical, sourced, and honest about what software can and cannot do.

The short version

1 **The fee gap is real**
Published guides put a residential panel job at about $200 to $400, and private residential work at $600 to $1,500 [4][5].

2 **Referrers bring the work**
Solicitors, accountants and executors send private work, and they come back when you are easy to instruct and quick to report.

3 **Make instructing effortless**
A clear fee list, a form that asks the right questions, and a quote they can sign the same day.

4 **Agree the job properly**
Scope, reliance and fees in writing, and signed, before you inspect.

5 **Stay in touch**
The referrer who sent three matters last year needs to hear from you this year.

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References Every number in this guide, with its source 9

1 · THE NUMBERS

Why private work, and why now

$732.2m

Industry revenue in 2025-26, after falling 3.7% a year for five years [1].

2,068

Valuation businesses in 2026, averaging about $354k of revenue each. The average is our arithmetic from [1] and [2].

$200 to $400

A residential panel job, against $600 to $1,500 for private residential work [4][5].

About 15%

Of residential mortgage valuations are now completed digitally [7].

What it means for a small firm

- At those published rates, one private residential job pays about what two to four panel jobs do. That is our arithmetic, and your own rates will differ.
- Full-fee panel inspections are under pressure as desktop and digital methods grow [7]. Private and legal work still needs a valuer on site and a report that can be tested.
- IBISWorld notes that larger firms are expanding into government and litigation work [1]. Small firms can compete for the private end of it on service.
- About 5,200 valuers are employed in Australia, with a median age of 41 [3]. It is a small, connected profession, and reputation travels by word of mouth.

THE RISK SIDE

Professional indemnity cover costs valuers about $1,200 to $3,000 a year per $1 million of cover, in a market with limited appetite for valuation risk [10][11]. Clear, signed terms are a record of what was agreed. They do not lower premiums, and nothing in this guide says they do.

2 · THE WORK

Who instructs, and what they need

Firms' own websites list the same private purposes again and again [14][15]. Each has its own instructing party and its own trap.

WORK	WHO INSTRUCTS	WHAT THEY NEED	WATCH FOR
Family law	Solicitors, sometimes for both parties	Independence, clear reliance, a report that can be tested	Access for both parties, and court rules on experts
Deceased estates	Executors and estate solicitors	Value at the date of death	A past date, and clients who are grieving
Capital gains tax	Accountants and owners	Value at a stated date, often in the past	The exact date and interest, and evidence from that time
SMSF	Trustees, accountants and auditors	Market value for the fund's accounts and audit	Timing around 30 June, and related-party dealings
Stamp duty	Solicitors, conveyancers and owners	Value for transfer duty, often between related parties	Your state revenue office's requirements
Pre-purchase and pre-sale	Owners and buyers	A quick, clear opinion of value	Expectations: a valuation is not a price guarantee
Rental determination	Landlords, tenants and lessees	Market rent under a lease or a rent review	The lease's own review clause

Ask the same questions every time

Put these on your enquiry form and your booking page, so they arrive with the instruction instead of three emails later.

- ☐ Purpose of the valuation
- ☐ Interest to be valued
- ☐ Access, and who to call
- ☐ Who referred them to you
- ☐ Date of valuation: today, or a past date
- ☐ Who will rely on the report
- ☐ Deadline, and why

3 · SOLICITORS

Be the valuer they can rely on

Family law and estate solicitors are the steadiest source of private work. They want a report that holds up, a turnaround they can plan around, and never having to chase you.

1 Make it easy to instruct

A short web form for solicitors: matter reference, parties, property, purpose, date of valuation, access and deadline. Confirm receipt the same day.

2 Quote with scope and reliance spelled out

Name who may rely on the report and for what. For joint instructions, say how both parties are addressed. Send your terms with the quote and have them signed before you inspect. For mortgage work, ANZVGP 112 expects the scope and terms to be annexed to the report [12].

3 Keep them informed

Brokers complain about communication as much as about price [9], and solicitors are no different. Say when the inspection is booked and when the report will land, before they ask.

4 Stay independent

Never let a party's hopes shape the value. The value you can defend is the one that brings the solicitor back.

5 Keep in touch between matters

A short, useful email a few times a year to referrers who have agreed to hear from you, and a thank-you after every referral. Record consent, as the Spam Act 2003 expects.

A same-day reply, for example

To: Daniel Okafor, Linden & Arkwright Lawyers · From: Harbourline Valuers (fictional)

Thanks, Daniel. Our fee for a short-form family law valuation of 14 Wattle Court is $880 including GST. The quote and our terms are in the link below, ready to sign online. Once signed, we can inspect on Thursday 9 October at 10 am, and the report will follow within three business days.

MEASURE IT

Keep a list of referrers with the matters each sent this year and last year. The one whose number fell is your first phone call.

4 · ACCOUNTANTS AND PRIVATE CLIENTS

Calendars, dates and easy payment

Accountants and SMSF work

- Plan for the calendar. SMSF and tax work bunches around the end of the financial year, so tell accountants in April how to book you for June and July.
- Offer a clear fee for repeat work. An accountant with many SMSF clients wants one fee and one turnaround, not a new negotiation each time.
- Be exact about dates. A retrospective valuation turns on its date, so state it, and say what evidence from that time you relied on.
- Ask where the report goes. Check whether the trustee, the accountant or the auditor should receive it, and address it to match.

Executors and deceased estates

- Be clear and kind. Many executors have never instructed a valuer. Explain the fee, the date of death and what you need from them, in plain words.
- Make paying easy. A deposit on acceptance and card payment from the invoice beat waiting on a cheque.

Owners and buyers

- Answer fast. Private clients often ring more than one firm, and a clear fee with a booking time is hard to beat.
- Publish your fees, or a guide to them. Fewer people ring to ask, and the ones who do are ready to book.
- Set expectations. A valuation is an independent opinion of market value, not a price guarantee.

> FROM THIS SERIES
>
> The fee schedule template and the terms of engagement template are written for exactly this work. Adapt them with your own adviser.

5 · THE SYSTEM

From enquiry to paid invoice

1 Enquiry ▸ 2 Fee quote ▸ 3 Signed ▸ 4 Inspection ▸ 5 Paid

STEP	GOOD LOOKS LIKE	WHERE IT BREAKS	HOW VALUFIELD HELPS
Enquiry	Every enquiry in one list, with where it came from	Email, calls and web forms in different places	Web forms that create the client record and note the source
Fee quote	A same-day quote from your fee list, with GST and your terms	Quotes typed in Word and lost in sent items	Quotes built from your fee list and sent with your terms
Signed	Signed before you inspect	Waiting for a scanned signature	Signing online by typing or drawing, with an audit page
Inspection	Booked at a time that suits, with access sorted	Phone tag	Booking pages with your hours, travel buffers and questions
Paid	Deposit up front, and the balance before release	Chasing a solicitor for weeks	Deposit and balance invoices, card payments once you connect Stripe, and reminders that stop when paid

A 30-day plan

- ☐ **Week 1** List your referrers and when each last sent you work.
- ☐ **Week 2** Write your fee list and your terms of engagement.
- ☐ **Week 3** Put an instruction form on your website and a booking link in your email signature.
- ☐ **Week 4** Send your first update to the referrers who have agreed to hear from you.

6 · HONESTLY

What Valufield does, and what it does not

Valufield is practice software for Australian valuation firms. It runs the work around the valuation report. This is where it stops.

WHAT IT DOES TODAY

- Enquiry forms and landing pages that create the client record and note where the enquiry came from.
- Email campaigns to referrers, with consent and unsubscribes recorded.
- Fee quotes from your fee list with GST, signed online, kept with an audit page.
- Booking pages with your hours, travel buffers, minimum notice and questions.
- GST tax invoices with your ABN once you add it, deposit invoices, and reminders that stop when paid.
- Card payments into your firm's own Stripe account once you connect it, with your bank details on the pay page.
- A client portal where clients view and pay invoices and download the files you share.
- Reports on new clients and where they came from, and on quotes, bookings, invoices and payments.

WHAT IT DOES NOT DO

- Write valuation reports, or replace the report software you use now.
- Form an opinion of value, by AI or any other means.
- Connect to lender panel platforms. Keep using them for panel instructions.
- Make your terms or reports meet any standard, or change your professional indemnity cover.
- Answer phone calls or send SMS yet. Australian numbers and an AI receptionist are coming next, and are not part of Valufield today.
- Connect to MYOB or QuickBooks yet.

About two-thirds of property professionals surveyed by the Australian Property Institute are open to AI in valuation [13]. Valufield keeps AI to admin. A valuation module is being scoped now.

Beside the software you already use

Keep PropertyPRO, your report templates and your panel platforms. Valufield runs the work around them, from the first enquiry to the paid invoice.

Your data

Each firm's records are walled off from every other firm's in the database itself, and automated tests check it. Staff can protect their accounts with two-step sign-in using an authenticator app.

Try it on your next private job, at valufield.com.au.

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Read in September 2026. Where a figure is our own arithmetic, the page says so.

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