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CGT GUIDE

CGT Valuations for Accountants & Advisers



How a defensible, independent property valuation supports the advice you're already giving your clients.

Why clients come to you first

When a client faces a CGT event involving property, you're usually the first call — long before they think about a valuer. That puts you in the best position to flag early whether an independent valuation is likely to be needed, and for which date.

How a valuation supports your advice

A defensible, independently prepared valuation gives your advice a stronger evidentiary foundation than an estimate, an agent's appraisal, or a client's own guess at what their property might be worth. It also protects your client — and by extension your advice — if the position is ever reviewed.

Where valuations come up most often in client conversations

- A client mentions they've started renting out a former home
- An estate matter crosses your desk, as executor or as beneficiary adviser
- A client is considering transferring property to a family trust, an adult child, or their SMSF
- A client asks about a property they inherited years ago and are only now selling
- A portfolio client needs several properties reviewed at once as part of a restructure

Referring vs. ordering

- Refer a client — send them a simple link to search their property and choose a valuation option themselves
- Order on their behalf — book the valuation directly, with the report delivered to you and your client together

Both paths keep you informed of progress and give you a copy of the finished report.

What this means for your professional risk

An independently prepared, evidence-based valuation doesn't just support the client's tax position — it supports yours. If a client's CGT treatment is ever reviewed, being able to point to a defensible, third-party valuation, rather than a client's own estimate or an agent's appraisal you passed along, is a meaningfully stronger position for the advice you gave.

Partnering with HTW

Advisers can register for a dedicated, no-cost adviser account — giving access to national coverage, a direct line to a valuation specialist, and client-ready resources you can share without having to write your own CGT valuation content.

FAQs

How do I order on behalf of a client?

Refer a client — send them a simple link to search their property and choose a valuation option themselves — or order directly and stay in the loop. See the Referring vs. ordering section above, or speak to a valuation specialist to set up an ongoing referral arrangement.

Can I order a valuation on behalf of multiple clients at once?

Yes — portfolio-style requests across a client base are generally supported, which is worth asking about if you regularly have several clients needing valuations at once, such as around a common CGT deadline or year-end reporting. A single point of contact can help coordinate multiple properties to a consistent standard and timeline.

Do I need to be involved in every step, or can I just refer my client?

Either approach works, depending on how hands-on you want to be. You can refer a client with a simple link so they search their property and choose a valuation option themselves, or you can order directly on their behalf and manage the process — both paths keep you informed of progress along the way.

Will I get a copy of the report if my client orders it themselves?

This depends on how the referral is set up at the time, so it's worth confirming when you refer the client rather than assuming. Setting up a formal referral arrangement, rather than simply sending a client the general website link, is generally the more reliable way to ensure you're kept in the loop.

Is there a cost to registering as an adviser?

Adviser registration is designed to be no-cost, giving your firm a dedicated account for referring and ordering client valuations without any setup fee. It's worth confirming the current details when you register, since offers and account features can be updated from time to time.

Can I set up a standing referral arrangement rather than referring clients one at a time?

Yes — advisers with an ongoing volume of CGT valuation needs can set up a dedicated adviser account, which keeps referrals, orders and reporting in one place rather than starting fresh with each new client. This tends to suit firms that regularly handle CGT events across their client base.

Note: This does not replace your own professional judgement or your firm's compliance requirements. Advisers remain responsible for the advice they give their own clients.