OPERATING STANDARD

Investor Review And Confidentiality Standard

This standard protects owners, protects Private Buyers, and makes investor review feel serious rather than loose. It sets the boundaries for what may be shared, who may see it, and what must stay internal.

VERSION	2026-07-02
STATUS	Investor review standard
OWNER	Private Buyers
USE	Operational document; not legal, valuation, tax, lending, building, or financial advice

Prepared for Private Buyers operational use on 2 July 2026. Review before material platform expansion, paid marketing scale-up, formal investor onboarding, or legal-structure changes.

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Use this page to jump to a section inside the PDF. The document is written as an operational guide, not legal, tax, valuation, building, lending, or financial advice.

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Who Can Receive A Review Pack

Share investor review material only with people who are genuinely considering the property, can act responsibly, and understand the confidential/private nature of owner-supplied information.

A potential purchaser receives only the information needed to assess whether to continue, not unrelated personal details or internal negotiation strategy.

The circulation record must show who received the pack, when it was sent, which version was sent, and whether any later correction or withdrawal instruction applied.

- Use limited circulation, not broad forwarding.
- Keep a record of who received the pack and when.
- Stop circulation if the owner withdraws permission.

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What Can Be Shared

Where permission is clear and the property appears suitable, relevant property details, photos, documents, condition notes, rent/occupancy information, and owner contact details may be shared for private review.

Use a minimum-use rule for each pack: include what helps a buyer review the property, exclude what is irrelevant or sensitive.

- Remove unrelated identity documents, bank details, health or family dispute information, and personal material not needed for review.
- Label material as private owner-supplied information.
- Refresh or correct packs if an owner supplies corrected details.

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What Must Stay Internal

Do not send internal investor-margin logic, negotiation limits, operator strategy, source quality scoring, or internal risk notes to owners unless deliberately rewritten as seller-facing explanation.

Do not send owners investor-only funding assumptions or contract-control notes.

Label tax, finance, insurance, and renovation assumptions as investor-side modelling unless separately checked by the relevant professional adviser.

- Seller-facing pack: practical review, discussion price, next steps, caveats.
- Investor pack: due diligence details, confidential owner-supplied evidence, investor review notes as approved.
- Operator-only pack: margins, strategy, risk flags, internal scoring.

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Contact Boundaries

If an investor contacts an owner, the owner must understand who is contacting them and that Private Buyers is not acting as a licensed agent unless the legal setup changes.

Investors must not pressure owners, represent themselves as Private Buyers staff unless authorised, or reuse owner information for unrelated approaches.

- Respect stop-contact and withdrawal instructions.
- Do not post owner photos or addresses publicly.
- Use lawyers/conveyancers for formal sale documentation.