



Foreign Investment Portal enhancements

The Foreign Investment Portal will be updated on 4 July 2026. This release introduces improvements to submission processes, information capture, and system usability. The changes are designed to make it easier for investors and their representatives to complete submissions, manage information, and meet reporting requirements.

Submission changes

Copying investor owner details

Portal users will be able to copy owner details from one investor to a second investor provided they are included in the same submission.

Key features include:

- A new option to add owner details from an existing investor.

Company Ltd

You have allocated 0% of this investor's ownership. You need to add (or, if the amount is negative, remove) 100% to ensure the ownership is fully allocated.

[Add owner](#) [Add owner from existing investor in this submission form](#)

Search...

Actions	Name	Type	Interest held in this investor	Country / Nationality	Foreign government investor
No records were available					

- A list of available owners entered in the current submission form, including name of owner, ownership type, interest held, and country or nationality.
- Users can also select one or more owners to copy into the current investor.

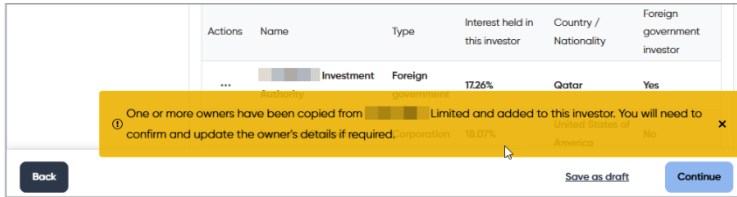
Add owner from existing investor in this submission form

Please choose owner(s) and click Select to continue

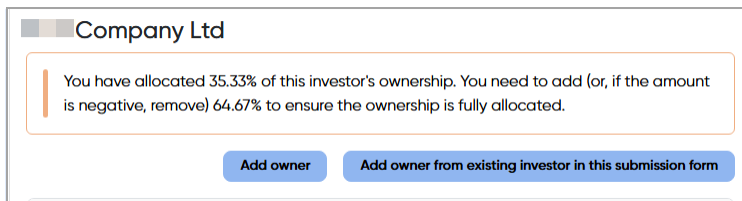
Search...

	Name of owner	Type	Interest held in this investor	Country / Nationality	Foreign government investor
<input type="checkbox"/>	Investment Fund	Foreign government	18.03%	Botswana	Yes
<input type="checkbox"/>	Individual Owner	Individual	2.82%	United States of America	No
<input checked="" type="checkbox"/>	Retirement Fund	Foreign government	43.82%	United States of America	Yes
<input checked="" type="checkbox"/>	Investment Fund	Foreign government	17.26%	New Zealand	Yes
<input type="checkbox"/>	Insurance Company	Corporation	18.07%	United States of America	No

- Once copied, a message will prompt portal users to review and confirm the owner's information. The copied owner information can then be edited for the new investor.



- A cumulative ownership percentage will also be displayed for all owners. A warning will appear where the total does not equal 100 per cent.



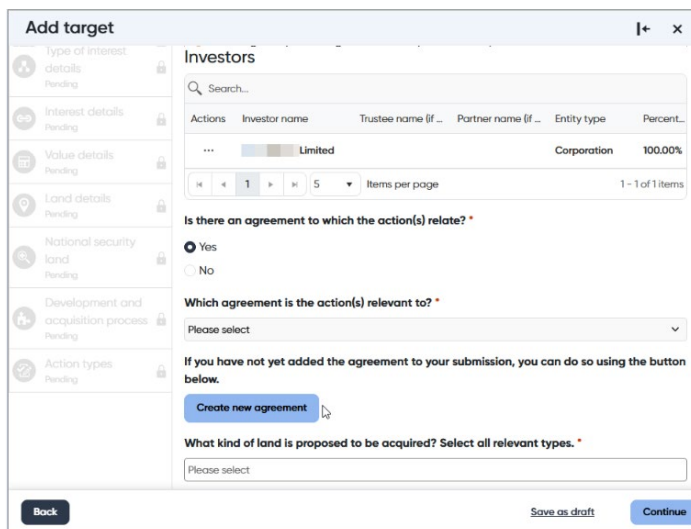
Agreements

Enhancements have been made to how agreements are created and viewed within a submission.

Add a new agreement in a target

Portal users will be able to create agreements directly when adding target details:

- A new option allows an agreement to be created from within the **Add Target** section of the submission. Agreements that are newly created using this feature are automatically linked to the relevant target.
- Users can still select from existing agreements where appropriate.



Reason for single agreement

A new mandatory question will be introduced in the Agreements section. Investors/agents must provide an explanation of why the single agreement rule applies to the relevant action(s).

Note: Existing draft submissions that include agreements will need to be updated before they can be submitted.

Agreements listed against each target

A new column will display the agreement associated with each target in the target view table. This will allow portal users to see which targets are linked to which agreements.

Actions	Order ↑	Target reference name	Target type	Related agreement	Status
...	1	Street, Sydney	Australian land	Storage	Completed
...	2 +	Limited	Australian business and/or its assets	agreement	Completed

Tax checklist

The updated [Tax checklist](#) provides greater clarity around the financing information required at time of submission, based on the specifics of the transaction. Uploading responses to the tax checklist is also now mandatory depending on the answers to certain tax questions.

These changes are intended to ensure information required for the assessment is provided up front, reducing unnecessary delays in processing.

Contextual questions

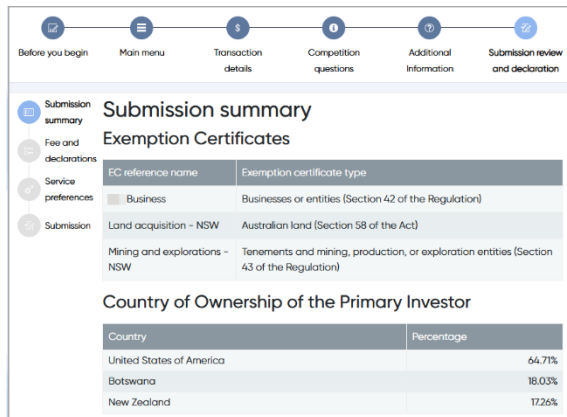
Updates will be made to the Contextual questions, including renaming sections to clearly describe the purpose of each section.

A new optional field will allow investors or agents to provide a brief summary of the transaction, including key parties, structure and purpose. This field is intended to provide additional context and does not replace the structured questions in the form.

Exemption Certificate submissions

A new **Submission summary** page will be added to the review and declaration step for an Exemption Certificate. This page will display key details, including the exemption certificate types and the reference names provided by the investor/agent.

A summary table will show the country of ownership for the primary investor, including percentage interests by country.



EC reference name	Exemption certificate type
Business	Businesses or entities (Section 42 of the Regulation)
Land acquisition - NSW	Australian land (Section 58 of the Act)
Mining and explorations - NSW	Tenements and mining, production, or exploration entities (Section 43 of the Regulation)

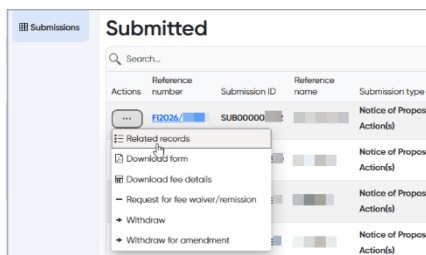
Country	Percentage
United States of America	64.71%
Botswana	18.03%
New Zealand	17.26%

Access to uploaded documents

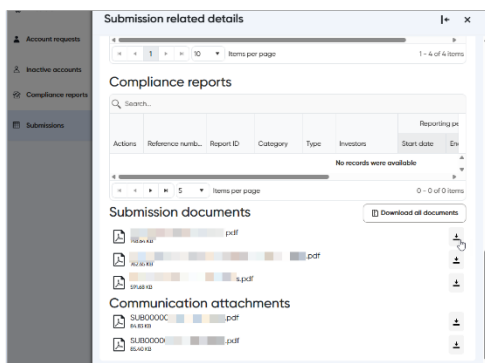
Portal users will be able to view and download documents originally uploaded as part of a submission, including message attachments. This functionality will also be available for Compliance Reports.

Documents will be available from the **Related records** view. Users will be able to download documents individually or as a single zip file. To access the documents in the portal:

1. On the **Submissions** page, move to the required submission under **Submitted** or **Finalised** section.
2. Click on the **Action** item and select **Related Records**.



3. Scroll to the end of the record.
4. Select the document to download or click **Download all documents** to obtain a zip file of all submitted or attached documents.



Communications

Improved communications

Updates to the communications features will make it easier to track and manage messages:

- The character limit in message texts will be increased to allow more detailed messages.
- Access to messages for a submission will be automatically removed when a user leaves the account which owns the submission.
- The variation submission acknowledgement message text has been updated to provide more information on when the fee request will be sent to the investor/agent.

Compliance reporting

Several updates will be introduced to improve how compliance reports are managed in the portal.

Draft Compliance report expiry and deletion

Draft compliance reports will be retained for **up to 28 calendar days** from the last time they are viewed or edited.

If a compliance report includes multiple related records, activity on one record will extend the expiry period for all related records.

A notification will be sent **7 days** before expiry to remind users that the draft will be deleted if no action is taken.

Display of reference numbers in draft documents

All referenced (FI) numbers included in compliance reports will be displayed in the footer of draft documents, replacing the current approach where only the first reference number is shown.

Additional questions in *Action Taken* and *Termination event* reports

A new question will be introduced for **Action taken** and **Termination event** report types.

Portal users will be required to describe the action or termination event being reported. This question will appear in the **Conditions** section of the reports.

The screenshot shows a web form titled "Edit report type" with a navigation sidebar on the left. The sidebar includes sections for "Report details" (Completed), "Investor details" (Completed), "Conditions" (In progress), and "Attachments" (Pending). The main content area is titled "Conditions" and contains two required questions:

- What was the date of action or termination? *** with a date input field (dd/mm/yyyy) and a calendar icon.
- What was the action or termination event being reported on? *** with a large text area for input, showing a cursor and a character count of "0 / 4000".