

Conveyancing Information Form

About You

Surname: Mr/Mrs/Miss/Other

Forenames:

Date of Birth: National Insurance No.¹:

Telephones Home: Work: Other:

When is it generally most convenient to telephone?

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Forenames:

Date of Birth: National Insurance No.¹:

Telephones Home: Work: Other:

When is it generally most convenient to telephone?

Address:

.....

..... Postcode:

Have you been involved in a previous marriage²? If so, please give details

.....

.....

Have you ever been made bankrupt²? If so, please give details

.....

When do you hope to be able to move?

Are there any dates you CANNOT move?

VERY IMPORTANT! It is impossible to guarantee a moving date until contracts have been exchanged. Consequently, it is most unwise to book removals or time off work or to make other arrangements about moving before contracts are exchanged and a firm moving date is agreed.

¹ We need this for completion of the Stamp Duty Land Tax return

² This information may help us advise you fully about aspects of the proposed transaction

About Your Sale

Property:
.....
..... Postcode

Buyer(s): Agreed Price: £.....

Estate Agents:

Address:
.....
.....

Telephone: Commission Payable £..... or..... %

Bank/Building Society holding Deeds:

Address:
.....
.....

Mortgage Ref/Acc No: Approximate Amount Due:

2nd Mortgage with:

Address:
.....
.....

Mortgage Ref/Acc No: Approximate Amount Due:

(If there are any other mortgages please give the same details overleaf)

Is anyone else living in the property other than you³? If so, please give details

.....
.....

³ Any adult occupiers will need to sign the sale contract to confirm their agreement to the sale

About Your Purchase

Property:
.....
..... Postcode

Seller(s): Agreed Price: £.....

How much (if anything) have you paid as a preliminary deposit?

How much (if anything) do you have for a deposit on exchange?

Do you want us to do your search **before** you have your survey done?

Note: Waiting for your survey can cause delay waiting for the local search after your survey is complete. On the other hand, if there is a problem on survey and the purchase does not proceed, you will have lost the search fee which is over £100.

Estate Agents:

Address:
.....
.....

Telephone:

To whom (if anyone) have you applied for a mortgage?

Address:
.....
.....

Amount you want to borrow:

Will anyone else be living with you⁴? If so, please give details
.....
.....

Is there anything you particularly want us to investigate? If so, please give details
.....
.....

⁴ Any adult occupiers not party to the mortgage will need to sign a formal consent to the mortgage and should have independent legal advice before doing so.

We'd like to communicate better!

Among the most common complaints about solicitors are that they never tell their clients what is happening and that they are impossible to get hold of. We'd like to try to change that. It is a feature of being popular and busy that much of the time in the day is spent on the telephone or in meetings so we can't promise you'll always be able to speak to the person handling your matter. However, we are very keen to take advantage of modern technology to make sure we keep in touch with you and you can contact us.

SMS text messaging

Two out of three people own a mobile 'phone and nearly all can receive text messages. It is often inconvenient to receive a call but messages can be received unobtrusively anytime, anywhere. We are proud to be the first firm in the area to introduce SMS text messaging as a free additional service to our clients.

To keep you right up to date with the progress of your case, we'll send you a text message whenever an important step is taken. For example, we'll tell you when we request and then receive your title deeds. More importantly, you'll know as soon as we exchange contracts and, later, when the keys to your new home are released.

To take advantage of this service please let us have a mobile 'phone number on which to receive the messages. If you wish, we can send the messages to two 'phones at the same time.

Please send SMS text messages to:

Mobile 'phone number	Name of mobile 'phone holder

Note: For security purposes we may telephone the number(s) and speak to the holder(s) before sending the first message.

For internal use only: Security call made by 1. 2. on 1. 2.

Email

But what if you can't get hold of us? The best way to get a message to us is by email so you'll find an email address on every letter we send you. And, if you have this facility then, as it is quicker and safer than 'snail mail', we'll be happy to correspond with you by email as much as possible. Of course, if you'd like us to send email to more than one address, we'll be happy to oblige.

Please send email to:

Email address	Where mail is picked up*
	Home / Work / Wherever I lay my PC
	Home / Work / Wherever I lay my PC
	Home / Work / Wherever I lay my PC

Note: For you techies, correspondence will be sent as an attachment in Word 97. If that will cause difficulties please let us know. (*This is so we have a better idea of when you are likely to receive it.)

Confidentiality

Many people have concerns about the privacy of email and, presumably therefore, text messaging. Frankly, we believe it can be no worse than normal post but for the avoidance of any doubt, the Law Society recommends we obtain specific consent to use these methods of communication. To enable us to do so, please will you sign below before returning this form. Thank you.

Signed	Signed
by	by

About Your Money

Hopefully you will have some money left over when you move. Traditionally, solicitors will send you a cheque in the post. When that arrives - a few days after the move - you have to find time to get to the Bank to pay in the cheque. Then you have to wait another few days for the cheque to clear before you can draw on it or earn any interest. So, that's 1 week's interest lost!

As you might imagine, we think things should be done differently. Naturally, we can offer the old fashioned 'cheque in the post' routine but we are also happy to send you the funds electronically. There are two choices; CHAPS (or Telegraphic Transfer) or BACS. CHAPS is a same day transaction. The money will be transferred directly to your account on the day you move so it is yours straightaway. BACS is slower and will arrive in your account on the second working day after you move. However, it arrives as cleared funds and so is available to you as soon as it arrives.

Unfortunately, we have to make a charge for these services (yes, there is a catch after all) so you'll need to be sure it is worth your while (for example, how much interest will you be losing?). Although you may change your mind at any time, it would be helpful if you could indicate below which method of payment you'd prefer and, if you would like an electronic transfer, please also let us have your bank details.

Please tick the appropriate box (you can change your mind later)

- I want my money the same day; please send it by CHAPS. I note the fee is **£30** plus Vat
- I can wait a couple of days; please send it by BACS. I note the fee is **£10** plus Vat
- I like the rain and standing in queues; please send me a cheque. At least there's no fee
- Actually, I'll be sending you money so this is all pie in the sky

The bank account details are:

Bank & Branch: Sort Code:

Account Holder: Acc No.:

And Finally . . .

. . . to confirm your instructions please could you sign below:

I/We accept your quotation dated and would like you to act on my/our behalf.
I/We agree and understand that:

Good Points

Your charges are a fixed fee which will not change unless an exceptional complication arises and you have agreed a separate fee with me/us. I/We do not have to pay anything except search or similar fees actually spent unless contracts are exchanged.

Not Such Good Points

You reserve the right to give a new quotation for any transaction which is agreed more than 6 weeks after the date of the quotation. I/We are not obliged to accept any revised quotation. If I/we choose not to accept it I/we owe you nothing except any search or similar fees actually spent. All search and other fees given in your quotation are only estimates and may vary.

Signed Signed
by by