

# TOZERS

## Purchase and sale checklist



## What vendors/buyers can do to get matters moving quickly.

### Purchases

- Collate your proof of funds, which no doubt will also be required by any Lender.
- Have your ID ready.

Everyone has their own ID requirements, however we require sight of something confirming an individual's name and something confirming an individual's address. We cannot undertake any substantive work until we have had sight of peoples original or certified copy ID and so providing this at the earliest opportunity always helps, as does flagging any problems an individual may have in providing the requisite documentation.

### Sales

- Collate any deeds or documents (including any replacement windows or boiler or wood burner installation certificates and any guarantees) you may have at home, and which may have been provided to you at the time of your purchase. This is particularly important if the Property is unregistered. If the deeds or documents are held by a third-party [i.e. those who acted for you at the time of your purchase] you should make contact with them and ask that these be released at the earliest opportunity.

- If you are keen to make progress once a sale has been agreed, ask that those you instruct open a file and provide you with the usual Protocol Forms [i.e. a Property Information Form and Fittings & Contents Form]. You can then be completing such Forms ahead of a sale being agreed, which allows you to hit the ground running so to speak.
- Flag any anomalies or peculiarities about the Property with those you have instructed (e.g. boundary disputes, party wall awards, covenant or access issues, solar panels, private water or drainage). This will enable them to research the position and put a solution to the buyers solicitor at an early stage.
- Collate any Planning or Building Regulation approvals for any works carried out during your period of ownership, or any such documentation you may hold for works carried out by your predecessors.
- If you have not had the heating system or any Aga/Rayburn serviced within the last 12 months, consider whether this is something you would be willing to do and if so arrange for it to be done. There is no legal obligation to do so but this is often something a buyer will insist on and which can cause delays.
- If the Property benefits from Solar Panels, collate details of those FIT Payments received by you together with any relevant service contracts. You should also locate any Building Regulations documentation for the installation of such Panels, including the relevant MCS Certificate.

- If you purchased the Property using a Help to Buy Equity Loan or the like, contact Target HCA and initiate the redemption process – which will no doubt involve your having to obtain a RICS Valuation [although such Valuation is time limited and so we would not suggest this be submitted to Target HCA until a buyer has been found].
- If selling a Flat or property which has to pay a Service or Maintenance Charge, collate details of those to whom the payments are made together with any other relevant documents such as Audited Accounts and AGM Minutes. It will be necessary for the Landlord/Management Company to complete a standard form however any information you can provide at an early stage will at least be giving the buyers solicitor something to review/progress.
- Have your ID ready.



**Get in touch**  
**Ready to talk?**

[www.tozers.co.uk](http://www.tozers.co.uk)  
[enquiries@tozers.co.uk](mailto:enquiries@tozers.co.uk)

**EXETER**

Broadwalk House  
Southernhay West  
Exeter  
Devon, EX1 1UA

01392 207 020

**TEIGNMOUTH**

2-3 Orchard Gardens  
Teignmouth  
Devon  
TQ14 8DR

01626 772 376

**NEWTON ABBOT**

10 St Paul's Road  
Newton Abbot  
Devon  
TQ12 4PR

01626 207 020