

Conveyancing starter form

PLEASE COMPLETE THIS NOW - We are unable to progress your transaction until this Form is returned. Please use **BLOCK CAPITALS** throughout. The information provided will help guide our advice to you.

SECTION 1 - YOUR DETAILS

First Client

(Please complete your full name here as these details will be used to draft legal documents)

Title (please tick) Mr Mrs Miss Ms Dr

All Forenames

Surname

Date of birth

Occupation

National Insurance Number

Current Address
If addresses are different we will only send correspondence to the First Client's address on behalf of both clients.

Postcode

Telephone Home

Telephone Work

Mobile

Email

Do you have children aged 17 or less? Y N

Will your assets (savings, investments, property etc.) exceed £325,000 for tax advice? Y N

Do you have a will? Y N

Second Client (if applicable)

(Please complete your full name here as these details will be used to draft legal documents)

Title (please tick) Mr Mrs Miss Ms Dr

All Forenames

Surname

Date of birth

Occupation

National Insurance Number

Current Address

Tick if same as first Client

Postcode

Telephone Home

Telephone Work

Mobile

Email

Do you have children aged 17 or less? Y N

Will your jointly held assets (savings, investments, property etc.) exceed £650,000 for tax advice? Y N

Do you have a will? Y N

SECTION 2 - YOUR SALE (Go to next section if you are purchasing only)

Is the property: Sold subject to contract On the market

What type of property is it? House Flat

Property owned by: Second Client Only First Client Only Joint names

Did we act when you purchased the property? Y N YEAR

Address of the Property you are selling

Tick if same as first client

Postcode

Asking or agreed price £

Selling Agent

Contact name at estate agent

Tel No.

Commission Rate Agreed £

Your existing Mortgage lender is

Account Number

This is very important as we need to retrieve your deeds

Approximate amount outstanding £

Do you have any other loans charged to the property? Y N

If 'Yes' Lender is

Approximate amount outstanding £

If you do not have a mortgage at all then please advise us of the whereabouts of the title deeds to your property

Holder

Address

Postcode

If you hold your title deeds then please forward them to us preferably by Recorded Delivery

SECTION 3 - SENDING YOU MONEY

For security reasons, we prefer to remit monies due to you direct to your bank account. Please confirm your nominated account details for us to send funds to you. Our preference is for joint clients to receive funds to a joint account where possible. The account cannot be in the name of a third party and cannot be overseas.

Account held by: First Client only: Second Client only: In joint names

Bank Branch

Account Number Sort Code

SECTION 4 - YOUR PURCHASE (Ignore this section if you are selling only)

To be purchased by: First Client Only Second Client Only In joint names Is this purchase a new build property Yes: No:

I/We intended to buy but have not yet found a property to purchase

Address of the property you are buying		Selling Agent	
		Branch	
		Contact Name at Estate agents	Postcode
	Postcode	Tel No.	
Agreed purchase price £		Are you having a mortgage?	Yes No, Cash Purchase
Will you be living at the property? Y N		If yes, amount you propose to borrow £	
What type of property is it? House Flat		Name of lender (if known) £	

SECTION 5 - PAYMENT ON ACCOUNT OF TITLE INFORMATION AND SEARCHES

(this section is only applicable once a sale or purchase price is agreed)

A payment on account is needed from you for the title information and searches we will be ordering on your transaction in accordance with our initial letter to you. We are unable to accept a payment from a third party. Please either attach a cheque payable to "Shoosmiths" for the amount requested in our covering letter. Alternatively complete the debit / credit card instruction below and we will then contact you on receipt with instructions for payment. Receipt of your advance will be taken as instruction to order searches on your behalf.

I/We attach a cheque made payable to "shoosmiths" for £ _____ or the amount required in your initial letter. or Please provide instructions for me / us to make online payment for searches and/or title information.

SECTION 6 - OCCUPIERS

Please give the names of any person over 17 years of age who will live with you in your new home not listed in Section 1.

Name	Age	Name	Age
Name	Age	Name	Age

SECTION 7 - SPECIAL CIRCUMSTANCES

Please use this space to highlight matters of which we ought to be aware. This may include family or financial matters that you would like to bring to attention, or a sensory disability, details of a second mortgage, or any other dependant mortgage, target completion dates, or issues specific to the property.

SECTION 8 - DECLARATION AND AGREEMENT

I/We confirm that the information given in this Starter Form is correct to the best of my / our knowledge.

I/We instruct Shoosmiths to carry out legal services on my/our behalf in accordance with their Terms and Conditions which I/we have received.

I/We authorise Shoosmiths to obtain my/our property title deeds (sale only).

I/We certify that the balance of purchase monies will be provided from our own funds unless we specifically instruct otherwise (purchase only).

I/We authorise Shoosmiths to act as our agent for completing and submitting a Stamp Duty Land Tax return to HM Revenue and Customs (purchase only).

Where a property is to be held jointly, we the undersigned agree and authorise Shoosmiths to accept and act on the instructions from any joint owners of the property and we agree to be bound by those instructions.

By signing and returning this starter form I/we acknowledge receipt of the Notice of the Right to Cancel and I/We authorise you to start work on our behalf straight away thereby waiving the cancellation provisions of the Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013.

(All clients must sign)

First Client *Sign here* Date

Second Client *Sign here* Date



The Lakes, Northampton NN4 7SH Telephone 03700 862200 Fax 03700 863001 Email newbusiness@shoosmiths.co.uk
Your calls may be recorded for security and training purposes.
Your home is at risk if you do not keep up repayments on a mortgage or any other loan secured on it.