

NEXT STEPS FOR GETTING STARTED WITH UPFRONT INFORMATION

STEP ONE

Before you can get up and running with Upfront Information, here's a few things you need to take care of first:

- 1** Talk to your local property network to engage with those also getting started with upfront information - to comply with the National Trading Standards Guidance on Consumer Protection from Unfair Trading Regulations.
- 2** Decide which software solution to use for collecting the Upfront Information and property data.
- 3** Talk to your team about the changes you are making and why - making sure you are clear what is in it for them and for their clients.
- 4** Depending on which solution the seller is using, they can either share their full Upfront Information pack with the Agent and the Conveyancer, or, the Agent will share it with the Conveyancer if their software systems are integrated.

If you need any additional support on any of the above (for example, top tips on building positive relationships in your local area) please get in touch: amanda@designsonproperty.co.uk

Getting started with Upfront Information
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STEP TWO

Once you have everything in place, you can follow this new and improved process outlined below – for progressing a property transaction with Upfront Information at its heart:

- 1 **AGENT:** Encourage client to instruct Conveyancer on day of marketing or **CONVEYANCER:** Take instructions from the seller client
- 2 **AGENT or CONVEYANCER:** ID the client using a Digital ID provider compliant with the Government [Digital-ID Trust Framework](#)
- 3 **AGENT or CONVEYANCER:** Send seller link or instructions on how to complete their Upfront Information pack
- 4 **AGENT or CONVEYANCER:** Order searches pack and title information document.
- 5 **CONVEYANCER:** Review the Upfront Information, searches and title documents, and create summary of the applicable relevant [material information](#), which would impact the average consumer's transactional decision.

- 6 **CONVEYANCER:** Send summary to estate agent to assist with property marketing compliance with the CPRs.
- 7 **AGENT:** Include summary of material information on property advert.
- 8 **CONVEYANCER:** Consider identifying for the seller issues that can be resolved prior to a buyer being found and taking instructions on whether they want to implement the solutions to reach a wider market.
- 9 **AGENT:** Qualify buyer on offer. Ideally using a Digital ID provider compliant with the Government [Digital-ID Trust Framework](#) in order to reduce fraud, check details of funding and financially qualify the buyer.

10 ON SALE AGREED

- AGENT:** Send material information summary as part of memo of sale.
- CONVEYANCER:** Send the [Property Pack](#) prescribed documents to the buyer's conveyancer – who are able to accept in-date search results provided by the seller so long as acceptable to any relevant lender.
- CONVEYANCER:** Ask seller to confirm that all information and data provided is accurate and up to date and either:
- i) Pre-populate TA forms/PIQ from the [Upfront Information pack](#) and arrange required signatures; or
 - ii) Collect the customer's confirmation within the Upfront Information software solution they have used.

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WHO CAN HELP YOU GET STARTED WITH UPFRONT INFORMATION?

Click on the company logos to visit their website.



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