



## Conveyancing Association Pledges

### *'A culture of fairness'*

The Conveyancing Association's Member Firms are committed to ensuring all their clients, whether institutions or individuals, are treated fairly and this culture of fairness extends to all their dealings with third parties. As such, Member Firms - whether regulated by the SRA, CILEX or the CLC - are not only adhering to their own regulatory requirements but have taken on board the objectives enshrined in the FCA Treating Customers Fairly and Consumer Duty Principles and have applied those to legal practice. In committing to this, Members recognise fair treatment of clients, clients' customers and third parties is about adding value to the service offered by aiming to:

- Act in the best interests of clients at each stage of the service provided from instruction right through to post-completion of the matter, and beyond registration to the provision of digital storage of data to aid future transactions and interactions with their property;
- Meet as best the unique needs of each client by offering a transparent, efficient and professional service, and constantly reviewing service to identify areas for improvement.

### The Pledges

<b>1</b>	Quality of service	Members will provide a first rate conveyancing service to all clients, regardless of the value of the instructions.
<b>2</b>	Client satisfaction	Members will ensure clients are satisfied with their service by requesting and acting on client feedback.
<b>3</b>	Efficient processes	Members will work to cut out delays in the conveyancing process and take steps to ensure transactions run as smoothly as possible.
<b>4</b>	Title and registration	Members will ensure property is acquired with a good and marketable Title and promptly registered at HM Land Registry.
<b>5</b>	Combating fraud	Members will take pro-active steps to protect mortgage funds and combat mortgage and property fraud.

<b>6</b>	Mutual support and trusted community	Members will work towards a trusted community of conveyancers through mutual support and information sharing between them.
<b>7</b>	Net Zero	Members will take pro-active steps to encourage clients to identify how they can improve the impact of their property on the environment to meet Government Net-Zero targets.
<b>8</b>	Digital data storage	Members will take steps to enable property data to be delivered and stored digitally to enable future digital interaction with the property throughout its life cycle.

### How will members do this?

Members will strive to achieve these pledges, both in spirit and in letter, through the following steps, where applicable to a particular transaction:

<b>1</b>	Quality of service	Members will provide a first-rate conveyancing service to all clients, regardless of the value of the instructions.
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Members will achieve this pledge by:

- Employing competent staff who are properly supervised;
- Training staff in 'soft' skills as well as technical conveyancing skills;
- Utilising case management systems;
- Keeping clients regularly informed of progress;
- Using plain language in correspondence and dealings with clients; being clear about likely costs - offering a fixed-fee policy in standard transactions with no hidden charges;
- Providing clear cost and disbursement information in non-standard transactions;
- Reviewing a selling client's Title and highlighting issues which might impact the sale;
- Identifying a buying client's intended use and enjoyment of the property and highlighting legal issues which might impact those;
- Agreeing the client's expectations at the outset and regularly reviewing these expectations with the client.

<b>2</b>	Client satisfaction	Members will ensure clients are satisfied with their service by requesting and acting upon client feedback.
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Members will achieve this pledge by:

- Measuring client satisfaction;
- Reviewing client satisfaction, at least quarterly, developing and implementing strategies to improve service standards;
- Ensuring all staff members are informed of these strategies and provided with adequate training to assist in their implementation;
- Working with clients who are not satisfied to seek to rectify their concerns.

<b>3</b>	Efficient processes	Members will work to cut out delays in the conveyancing process and take steps to ensure transactions run as smoothly as possible.
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Members will achieve this pledge by:

- Communicating with all parties by electronic means, where possible; Raising enquiries as soon as possible after the contract pack is received and, where possible, within three working days;
- Not raising unnecessary enquiries;
- Making a welcome call to clients as soon as possible after instructions and, wherever possible, within one working day;
- Requesting all searches electronically, where possible;
- Effectively using and developing case management systems to improve efficiency and reduce delays.

<b>4</b>	Title and registration	Members will ensure property is acquired with a good and marketable title and promptly registered at HM Land Registry.
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Members will achieve this pledge by:

- Promptly submitting applications to HM Land Registry within priority; Effectively dealing with, and seeking to minimise, any requisitions, rejections or cancellations from HM Land Registry;
- Requesting HM Land Registry expedite registration where hardship would be caused;
- Giving post-completion work the same priority as pre-completion work; Keeping clients and lenders informed where registration is delayed and working with all parties to promptly rectify registration issues.

<b>5</b>	Combating fraud	Members will take pro-active steps to protect mortgage funds and combat mortgage and property fraud.
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Members will achieve this pledge by:

- Verifying the seller's conveyancer;
- Properly verifying their clients and the source of client funds;
- Verifying all new staff members;
- Co-operating and, where necessary, actively participating in anti-fraud measures;
- Conducting enhanced due diligence when appropriate.

<b>6</b>	Mutual support and trusted community	Members will work towards a trusted community of conveyancers through mutual support and information sharing between members.
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Members will achieve this pledge by:

- Cooperating with all other members on the development of common procedures and protocols;
- Supporting the implementation of these pledges and the development and implementation of new pledges from time to time;
- Supporting other members through communal guidance;
- Regularly attending all member meetings.

<b>7</b>	Net Zero	Members will take pro-active steps to encourage clients to identify how they can improve the impact of their property on the environment to meet Government Net Zero targets.
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Members will achieve this pledge by:

- Deploying up-to-date methodology to reduce their climate impact;
- Encourage clients to check Material Information and, for those who will need a mortgage, to obtain a decision-in-principle before viewings to avoid travelling to a property which is not appropriate for them;
- Considering whether to refuse instructions from clients, [The Law Society's Climate Guidance](#) confirms climate-related issues may be valid considerations in determining whether to act.

<b>8</b>	Digital data storage	Members will take steps to enable property data to be delivered and stored digitally to enable future digital interaction with the property throughout its life cycle.
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Members will achieve this pledge by:

- Endeavouring to provide clients with a link to a digital storage area or digital Property Logbook to enable them to interact with their property's details digitally when considering alterations, refinancing, retrofit or sale.