



Conveyancer Estate Agent

BEST PRACTICE GUIDE



This Best Practice Guide has been formulated as a result of the experience of Conveyancing Association members in working with estate agents colleagues in the industry. Whilst not mandatory, it brings together what the Conveyancing Association believes is a sensible and measured approach in helping to improve communications for the benefit of all concerned. The Association is delighted to be continuing to play a part in building a common sense approach to conveyancing and through publishing this Updated Best Practice we hope that members and their estate agent colleagues will be able to help improve the conveyancing journey for all clients and improve customer satisfaction.

Nicky Heathcote

Chair, Conveyancing Association



Introduction

The Conveyancing Association is keen to promote good working practices between conveyancers and estate agents. The purpose of this Best Practice is to outline those practices and procedures that would assist and potentially improve both the client's and the estate agent's understanding of the conveyancing process by increasing communication between all parties in relation to sale and purchase property transactions.

The Best Practice Guide demonstrates the commitment of Conveyancing Association members to work with all parties to improve the conveyancing process and experience. The following Best Practice does not impact on our ability to always act in our client's best interests and follow express instructions, but has the potential to improve upon the requirement for accurate information provided in a format that is appropriate and time effective for all parties.



“ The Conveyancing Association is the best place to be able to shape key changes and developments in the conveyancing marketplace, meet the right people in the business and develop our own firm to become one of the best players in a growing part of the property industry. ”

Victoria Mortimer
Knights LLP



Material Information

- Provide a summary of the relevant Material Information applicable to the property, on a sale and request the Material Information on a purchase.
- Propose solutions to title issues revealed by Material Information.

Communication

Structured Progress Updates

- Phone call to the estate agent from the conveyancer at least once weekly at pre-agreed times with an accurate update on the progress of all transactions.

This is a general guideline and in cases which have become difficult, protracted or where exchange of contracts is imminent, additional communication will be required.

Weekly Updates

- Emailed weekly updates of the progress of all transactions, with succinct information as to the action taken, next action due and timescale for progress of the transaction and chasing up the action. Proposed dates for exchange of contracts should be highlighted where possible.
- The communication exchange will specify any outstanding information in an attempt to engage all parties on the information that is required to progress the transaction.

Digital ID

- To improve the customer journey, all parties to share digital verification of client ID under the Digital Identity and Attributes Framework.

Returned telephone calls and emails

- Both parties to agree timescales for the return of voicemails and emails.

Case Tracking Facility

- Estate agent access to the conveyancer's Online Case Tracking System (if available) – with appropriate agreement that this system is kept up to date.

Chain Details

- To facilitate the co-ordination of the chain, to be provided by the estate agent to the conveyancer.

Predicted Exchanges

- Predicted exchanges/completions to be agreed between the conveyancer and the estate agent at the start of the month, with regular assessments as to the progress made throughout the month.
- The client and the lawyer on the other side of the transaction are to be informed of the intention to exchange contracts during the calendar month.
- All parties will prioritise these predicted transactions and work together to get them to exchange of contracts as quickly as possible.

Working Together

- All parties will work together in a professional and respectful manner at all times.
- All parties will work together to share information and to process all transactions as quickly as possible.
- All parties will communicate when a transaction completes or falls through.
- The client's requirement for the collection of keys will be accurately communicated, as will confirmation of when keys can be released once funds have been received to complete the transaction.
- Each party will ensure that their staff are aware of basic conveyancing procedure and the protocol to which we endeavour to work together.
- All parties to share accurate chain information unless the client withdraws consent to share chain information, in which case, the parties should identify the withholding of consent to each other.



The Conveyancing Association

Peershaws, Berewyk Hall Court, White Colne, Essex CO6 2QB
Phone: 01787 221021 | www.conveyancingassociation.org.uk



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@catradebody

