Legal & Conveyancing Checklist

Conveyancing feels like a black box until you know the sequence. This is the sequence — and the handful of enquiries that genuinely protect an investor, so you can push where it matters instead of chasing everything equally.

HOW TO USE THIS — Start it the day your offer is accepted. Tick items as your solicitor confirms them, and chase weekly on anything still open.

01 Instruction week

- ☐ Solicitor instructed, ID checks done, funds source evidenced
- ☐ Memorandum of sale received and details checked
- ☐ Searches ordered immediately — local authority searches are the slow ones
- ☐ Survey booked (level 2 for standard stock; level 3 for anything old, altered or odd)

02 Enquiries that matter

- ☐ Title: any restrictions, covenants or charges that touch your intended use
- ☐ Boundaries and access match what you saw on the ground
- ☐ Building regs completion certificates for every alteration
- ☐ Leasehold: remaining term, ground rent review clauses, service charge accounts (3 years), planned major works
- ☐ Tenanted property: deposit protection, gas/electrical certificates, the actual tenancy agreement
- ☐ Planning history and anything enforcement-related

03 Exchange readiness

- ☐ Mortgage offer issued and valid past your target completion date
- ☐ Survey findings resolved: renegotiated, quoted or accepted in writing
- ☐ Buildings insurance arranged to start on exchange, not completion
- ☐ Deposit funds cleared with the solicitor
- ☐ Completion date agreed that works for tenancies, trades and finance drawdown

04 Completion day

- ☐ Funds requested from lender several days ahead
- ☐ Final statement checked line by line — query anything unexplained
- ☐ Keys, alarm codes, meter locations and appliance manuals from the agent
- ☐ Meter readings photographed on day one
- ☐ Stamp duty return filed by your solicitor within 14 days