



## SOLICITOR PROCESS CHECKLIST - BUYER SIDE (RESIDENTIAL PURCHASE)

### PRE-CONTRACT STAGE

- Receive client instruction and confirm ID, AML, and source of funds
- Open file, issue terms of business, and confirm instructions in writing
- Obtain draft contract pack from sellers solicitor
- Order searches (Local Authority, Water & Drainage, Environmental, etc.)
- Raise initial enquiries based on the contract and title
- Carry out due diligence on title, boundaries, restrictions, and planning
- Review and advise on lease/freehold details (if applicable)
- Request and review management pack (if leasehold or shared freehold)
- Monitor progress of search returns and responses to enquiries

### PRE-EXCHANGE

- Receive mortgage offer (if applicable) and review conditions
- Report to client on legal findings, search results, and title issues
- Arrange signing of contract, mortgage deed, and associated paperwork
- Ensure all enquiries are satisfactorily answered
- Confirm building insurance arrangements in place from exchange
- Check buyer is happy to proceed and funds are in place for deposit
- Set exchange and completion dates with all parties
- Obtain signed documents from client

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## EXCHANGE OF CONTRACTS

- Confirm exchange verbally and in writing with sellers solicitor
- Send deposit funds (normally 10%)
- Issue contract to seller's solicitor and receive counterpart
- Advise client of exchange and confirm completion arrangements

## PRE-COMPLETION

- Send completion statement to client (with balance due)
- Request mortgage funds from lender (if applicable)
- Confirm receipt of all required funds from client
- Finalise any outstanding legal checks or pre-completion searches
- Prepare and agree completion undertakings

## COMPLETION

- Transfer completion funds to sellers solicitor
- Receive confirmation of key release
- Notify estate agent and client of completion
- Send completion letters to all relevant parties

## POST-COMPLETION

- Submit SDLT return and pay Stamp Duty (if applicable)
- Register transfer of ownership with HM Land Registry
- Send final documents (Title, proof of registration) to client and lender
- Close file and archive as required