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|  | Property Sales File |

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| Price: |  |
| Property: |  |
| Seller: |  |
| Buyer: |  |
| Sellers Solicitor: |  |
| Buyers Solicitor: |  |
| Service:(if applicable, add competing agents details) |  |

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| Enquiry |
| Seller source:Who passed on the seller |  |
| Buyer lead:Who booked the sales viewing |  |

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| Seller Instructs us to Sell – Part 1 |
| Money Laundry Checks: |  |  |
| Copy of the signed terms and conditions |  | **☐** |
| Have copy of ID | Passport or driving license | **☐** |
| Confirm ID and address of seller (Land Registry or Verfi check) |  | **☐** |
| Key Information: |  |  |
| Does seller have any holidays booked | Dates | **☐** |
| Produce floorplan |  | **☐** |
| Produce property particulars with EPC details |  | **☐** |
| Seller docusigned a copy of the sales particulars to confirm they are correct |  | **☐** |
| Check Land Registry Title |  | **☐** |
| Check planning permissions | Reference number | **☐** |
| Check building regulations consent | Reference number | **☐** |

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| Seller Instructs us to Sell – Part 2 |
| Investment Report: |  |  |
| Calculate the do nothing, do some thing, and do everything investment yield report |  | **☐** |
| Last three tenancy terms and rents table |  | **☐** |
| Calculate maintenance spend (if available)View A Persons Accounts and find the landlord. Tick the Supplier Payments account, In the Properties drop down select the Property you need. Select date range. Export and sum up spend | **☐** |
| Copies of planning permission(if available) |  | **☐** |
| Copy of building regulations approval(if available) |  | **☐** |
| Epc report |  | **☐** |
| Gas safety certificate |  | **☐** |
| Electrical certificate(if available) |  | **☐** |
| HMO license(if required) |  | **☐** |
| Inventory(if available) |  | **☐** |
| Complete the fixtures and fitting report |  | **☐** |
| Copy of current tenancy agreement |  | **☐** |
| Check if any 'easement' considerations* Fire escape stairs
* Overhanging flues into neighbors property
 | Detail | **☐** |
| Recommend lawful use planning permission (if required) | Why | **☐** |
| Recommend insurance policy purchase(if required) | Why | **☐** |
| Marketing Property |
| Adverts |  |  |
| Investment pack complete |  | **☐** |
| Write short sales particular and add to landlord statements |  | **☐** |
| Add property to pinnacle website with download to full property details |  | **☐** |
| Add property to Rightmove |  | **☐** |
| For Sale board on property |  | **☐** |
| Order 3 Ravensworth A3 window cards and post to branch |  | **☐** |

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| Prospecting Buyers |
| Call investment landlord applicants | Who and how manycalls made | **☐** |
| Search for landlords with properties on the same street and call | Who and how manycalls made | **☐** |
| Create mail chimp email with short property particulars and links to download full details and investment yield report | Date sent | **☐** |
| Land Registry search properties both sides and call landlord | Date called | **☐** |

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| Offer Made |
| Contact Details |  |  |
| Name of buyer |  |  |
| Email |  |  |
| Telephone numbers |  |  |
| Home address |  |  |
| Offer |  |  |
| Offer Made | £……………………………. | **☐** |
| Date received offer | Dates and how received | **☐** |
| Copy of proof of funds | How and how much | **☐** |
| Confirm if buyer plans to do a building survey(not confused with mortgage valuation) | Date |  |
| Dates of buyers holidays | Dates | **☐** |
| Buyers solicitors* Name
* Address
* Email and Tel
 |  |  |
| Present Offer to Seller |  |  |
| Sent to seller | Date | **☐** |
| Offer accepted | Date and how much | **☐** |
| Offer Accepted |
| Sales memorandum |  |  |
| Send sales memorandum to both solicitors including* Sales particulars
* Key documentation pack
* Planning permissions
* Building regulation
* Land Registry Title
 | Date sent | **☐** |
| Confirm received by buyers solicitor | Date confirmed | **☐** |
| Confirm received by sellers solicitor | Date confirmed | **☐** |
| Marketing |  |  |
| Order SSTC banner on sales board |  | **☐** |
| Inform branches to add transparent SSTC for window cards |  | **☐** |
| Add SSTC on website |  | **☐** |
| Add SSTC to landlord statements |  | **☐** |
| Tick SSTC on Rightmove |  | **☐** |

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| Sales Progression |
| If in any doubt, always call the buyers solicitor for “an update” Call every Tuesday and Thursday |
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|  | Sellers Solicitor |  | Buyers Solicitor |  |
| **☐** | Have they been instructed |  | Have they been instructed & pay for searches | **☐** |
| **☐** | Have they issued draft contract |  | Is the mortgage application in and survey booked | **☐** |
|  |  |  | Have they received draft contracts&Applied for searches | **☐** |
|  |  |  | Have you received the mortgage Offer&Have you checked it | **☐** |
| **☐** | Received & Answered any enquiries |  | Are search results in are there any enquiries | **☐** |
| **☐** | Sent contract to seller to sign after buyers seller has made changes |  | Have all searches, enquiries and mortgage report to buyer | **☐** |
|  |  |  | Received Pinnacle invoice | **☐** |
| **☐** | With signed contractIn**Exchange** |  | With signed contract & deposit in**Exchange** | **☐** |
|  |  |  | Date exchanged | **☐** |

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| Property Sold |
| Take down for sale board |  | **☐** |
| Remove from landlord statement |  | **☐** |
| Remove from Rightmove |  | **☐** |
| Change on website to property sold and move to bottom on the list |  | **☐** |
| Inform finance of introducers for bonus payments |  | **☐** |
| Lock away file and this form |  | **☐** |

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| Notes page |
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