SELLER’S GUIDE

Property Sale, Protocol Forms & Pre-Sale Workbook

Produced by
Woodstock Legal Services
by Oakmont Legal

A practical guide for sellers and estate agents

This workbook explains the conveyancing sale process, the information required to prepare the legal pack, and the actions that can help prevent avoidable delays.

Please keep this document available throughout the transaction and notify us promptly if any information changes.

Welcome

Thank you for instructing Woodstock Legal Services by Oakmont Legal in connection with the sale of your property. This workbook is intended to help sellers, estate agents and other participants understand the key stages of a residential sale and the information we will need to progress matters efficiently.

> **Important: A sale is not legally binding until contracts are exchanged. Do not commit to removals, a related purchase, or other completion-dependent arrangements until exchange has taken place.**

How to use this workbook

- Read the Seller's Guide for the overall process and key responsibilities.
- Use the Protocol Forms Overview when completing the TA6, TA10 and, where applicable, TA7 forms.
- Work through the Pre-Sale Checklist as early as possible and provide documents promptly.
- Keep us informed about changes, new issues, agreements with the buyer, or correspondence affecting the property.

Contents

1. The Sale Process

The precise timing of a sale depends on factors such as the buyer's mortgage, survey, searches, title matters, the length of the chain and, for leasehold properties, the speed at which management information is supplied. The following provides a general guide.

Stage	What happens	What we need from you
1. Instruction and set-up	We verify identity, carry out anti-money-laundering checks, obtain title information and ask you to complete the sale forms.	Return signed forms, identification, proof of address and requested supporting information promptly.
2. Contract pack	We prepare the draft contract and supporting documentation, then send it to the buyer's solicitors.	Provide title documents, guarantees, certificates, planning/building paperwork and any documents you hold.
3. Enquiries	The buyer's solicitors review the legal pack and raise enquiries.	Provide accurate, clear replies and any available supporting evidence.
4. Buyer's mortgage and searches	The buyer deals with their lender, surveyor and search providers. These matters are generally outside the seller's control.	Tell us if a new issue arises that could affect the property or replies already given.
5. Exchange of contracts	Once all parties are ready, contracts are exchanged and the completion date is fixed. The sale then becomes legally binding.	Confirm the completion date works for you and sign documents as requested.
6. Completion	The purchase money is received. We redeem secured lending and account to you for the net proceeds.	Vacate the property, take meter readings and leave keys as agreed after confirmation of completion.
7. After completion	We issue a financial completion statement and deal with authorised payments and mortgage redemption evidence.	Review the statement and raise any queries promptly.

Keep in touch: Delays often arise because information, signed documents or replies are awaited. Early and complete disclosure helps protect your position and keeps the chain moving.

2. Your Responsibilities

The information you provide forms an important part of the contract documentation. Your replies must be complete and accurate to the best of your knowledge. If you are uncertain, please do not guess—tell us what you know and provide any relevant paperwork.

Tell us immediately if any of the following applies

- There is a mortgage, secured loan, Help to Buy equity loan, solar-panel lease or other charge affecting the property.
- The property is leasehold, shared ownership, part of a managed estate or subject to service-charge or ground-rent demands.
- There has been an extension, conversion, structural alteration, replacement window installation, boiler replacement or other works.
- There has been a dispute, complaint, insurance claim, flood event, subsidence concern, Japanese knotweed issue or neighbour matter.
- Someone occupies the property, including a tenant, lodger or person who may claim a right to remain.
- A seller is unavailable, has died, lacks capacity, is acting through an attorney, or the sale involves probate, a trust, company or court order.
- You will be abroad around exchange or completion, or are not UK resident for tax purposes.
- The sale proceeds are needed for a related purchase, must be paid to more than one person, or will be used to redeem additional liabilities.

Changes after signing forms

You must notify us if information changes between signing the protocol forms and completion. Examples include a new dispute, an insurance claim, a boiler failure, a planning or leasehold notice, a change in occupiers, or an agreement to leave additional items for the buyer.

> **Please do not rely on informal discussions with the buyer or estate agent. Any agreement that affects fixtures, contents, occupation, timing or financial arrangements should be reported to us so that it can be properly recorded.**

3. Protocol Forms Overview

The Law Society protocol forms give the buyer information about the property and the items included in the sale. Please complete them carefully, using the supporting notes provided by the form and the documents you hold.

Form	Purpose	Seller action
TA6 — Property Information Form	The main property-information form. It covers boundaries, disputes, notices, alterations, planning/building regulations, guarantees, insurance claims, flooding, utilities, access, parking, occupiers and other matters affecting the property.	Check previous files and correspondence. Provide documents, and disclose resolved as well as ongoing issues where relevant.
TA10 — Fittings and Contents Form	Records what is included, excluded or available separately, such as appliances, carpets, curtains, light fittings, garden items and fitted furniture.	Make sure it reflects the actual agreement. Tell us of changes or additional items agreed with the buyer.
TA7 — Leasehold Information Form	Used for leasehold property. Covers ground rent, service charge, insurance, consents, major works, management arrangements, arrears and notices.	Supply lease and managing-agent details, recent demands/statements, share certificates and any notices or correspondence.

Other documents that may be required

- Official title documents and any deeds or documents you hold.
- Energy Performance Certificate (EPC), where required.
- Planning permissions, building-regulation approvals and completion certificates.
- FENSA/CERTASS certificates, electrical certificates, boiler records and service history where available.
- Warranties, guarantees, indemnity policies, NHBC or other building-warranty documents.
- For leasehold: a management information pack, service-charge and ground-rent statements, buildings-insurance information, and share or membership certificates.

4. Pre-Sale Advice

Preparing early can materially reduce delay. The points below focus on the issues that most often generate enquiries or require extra documentation.

Before marketing or as soon as possible

- Locate your purchase file, lease, guarantees, warranties, certificates, planning approvals and service records.
- Check your name on the title. If it has changed, provide marriage, divorce, deed-poll or other supporting evidence.
- Identify any mortgage, secured borrowing, equity loan, restriction or charge affecting the property.
- If leasehold, obtain current service-charge and ground-rent information and confirm managing-agent/freeholder contact details.
- Check whether you have a valid EPC and arrange one where necessary.
- Ensure the estate agent’s particulars accurately state the tenure, parking, number of bedrooms, garden, access and items being included.

Alterations and consents

Tell us about all works undertaken during your ownership, including extensions, loft or garage conversions, internal structural changes, conservatories, new boilers, replacement windows, garden offices, driveways, dropped kerbs, solar panels, electrical work or log burners. Please provide all documents held. Do not contact a local authority or other third party about missing consent documentation without first taking legal advice, as this can affect available solutions.

Boundaries, neighbours and condition

- Disclose boundary, access, parking, noise, tree, shared-driveway and neighbour issues, including informal or resolved disputes where relevant.
- Tell us about flooding, subsidence, structural movement, insurance claims, drainage problems, Japanese knotweed, contamination or recurring defects.
- Buyers should arrange their own survey. We cannot assess physical condition, but the information given in the forms must remain accurate.

Leasehold and managed estates

Leasehold transactions commonly take longer because management information is needed from the landlord, managing agent or management company. Packs usually carry a fee and may need updating before exchange or completion. Tell us about arrears, disputes, major works, Section 20 consultation, consents, breaches, planned expenditure and any share certificate or membership document.

5. Seller Action Checklist

Use this checklist to track documents and information. Tick items as they are provided or mark them not applicable. If you do not have a document, please tell us—do not delay returning the rest of the paperwork.

Identity and ownership

- ■ Photo ID and proof of address for each seller
- ■ Evidence of name change, if applicable
- ■ Death certificate/grant of probate, power of attorney, trust or company authority, if applicable
- ■ Any original deeds or ownership documents held

Property documents

- ■ EPC
- ■ Planning permissions and approved plans
- ■ Building-regulations approvals and completion certificates
- ■ FENSA/CERTASS certificates for windows/doors
- ■ Electrical installation or test certificates
- ■ Boiler installation and service records
- ■ Guarantees, warranties, indemnity policies and NHBC/building warranty papers

Financial information

- ■ Mortgage/secured loan lender details and account numbers
- ■ Help to Buy or other equity-loan details
- ■ Estate agent’s name, branch and agreed commission
- ■ Details of any early-repayment charge or fixed-rate end date

Leasehold/managed estate

- ■ Lease and any variation/extension documents
- ■ Managing-agent/freeholder contact details
- ■ Latest service-charge and ground-rent demands/statements
- ■ Buildings-insurance information
- ■ Share certificate or management-company membership certificate
- ■ Major works, Section 20, arrears or dispute correspondence

Completion preparation

- ■ Signed TA6, TA10 and TA7 where applicable
- ■ Signed contract and transfer deed when requested
- ■ Agreed completion date confirmed
- ■ Key-release arrangements agreed
- ■ Property cleared; meter readings and documents ready for handover

6. Preparing for Exchange and Completion

Exchange fixes the completion date and makes the sale legally binding. Before we exchange, all parties in the chain must be ready, the contractual documentation must be agreed, and all relevant signatures and funds must be in place.

Before exchange

- Confirm that the proposed completion date works for you and that you can move out on time.
- Ensure all sellers can sign the contract and transfer when requested.
- Tell us if a related purchase, removal date, work commitment or travel plan affects your availability.
- Check that any agreed fixtures, fittings and contents are accurately reflected in the TA10 and contract paperwork.
- Do not make irreversible arrangements that depend on the sale completing until contracts have exchanged.

Completion day

- Vacate the property by the agreed time, commonly no later than early afternoon unless a different arrangement has been made.
- Remove all personal belongings and rubbish, leaving agreed fixtures and contents in place.
- Take final gas, electricity and water-meter readings where applicable.
- Leave manuals, warranties, relevant documents, parking permits, alarm information and keys as agreed.
- Do not release keys directly to the buyer. Keys are normally released through the estate agent once we confirm that completion has taken place.

Sale proceeds and fraud prevention

We will obtain a mortgage redemption statement where required and redeem secured lending from the sale proceeds. For security, we will verify bank details before transferring funds. We will not rely on bank-detail changes sent solely by email. If you receive an unexpected request relating to money, bank details or completion arrangements, contact us using independently verified contact details before taking any action.

> **Final reminder: Please tell us immediately if circumstances or information change. Prompt communication is one of the most effective ways to avoid delay and help achieve a smooth completion.**

Produced by Woodstock Legal Services by Oakmont Legal

This workbook is a general client guide and does not replace tailored legal advice on your individual transaction. Please contact your case handler with any questions or additional information.