

Guide

# Homeowner Welcome Pack



The logo for Andrew Granger & Co features a pink triangle pointing upwards above the company name. The name is written in a bold, sans-serif font, with 'ANDREW' on the top line, 'GRANGER & CO' on the bottom line. A pink horizontal line with upward-pointing ends is positioned below the text.

ANDREW  
GRANGER & CO

The logo for Sheldon Bosley Knight consists of a vertical orange bar to the left of the text. The text is arranged in three lines: 'SHELDON' on the top line, 'BOSLEY' on the middle line, and 'KNIGHT' on the bottom line, all in a bold, sans-serif font.

SHELDON  
BOSLEY  
KNIGHT

The logo for Land and Property Professionals is enclosed in a white rectangular border. The text 'LAND AND PROPERTY PROFESSIONALS' is written in a small, all-caps, sans-serif font, stacked in three lines.

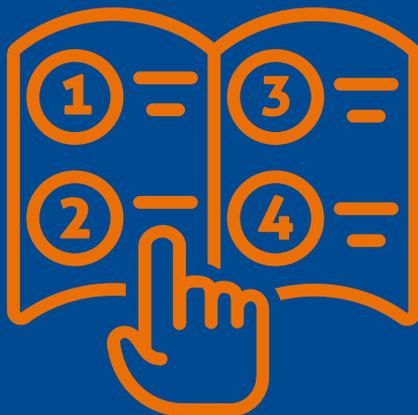
LAND AND  
PROPERTY  
PROFESSIONALS

# Contents.

Introduction	3
What is the Welcome Pack	4
What does it contain?	5
To-do list	6
Tips for completing	7
Actions to complete	8
Disclaimer	9
Final Message	10

# Your Step-by-Step Guide to the Welcome Pack Process.

The Welcome Pack is an essential part of the conveyancing process. This guide explains its purpose, what you need to do, and how to complete it efficiently. Follow these steps to get started.



# What is the Welcome Pack?

The Welcome Pack provides all the necessary forms, documents, and instructions to begin your conveyancing process. It ensures that your solicitor has all the relevant details to move the transaction forward securely and efficiently.

# How Quickly Should I Complete It?

It's important to return the completed Welcome Pack as soon as possible, ideally within 7 days of receiving it. Timely completion helps to avoid delays in your transaction.

# What Does the Welcome Pack Contain?

Your Welcome Pack will include the following forms and documents:

- Client Information Form: Your personal details for correspondence.
- Property Information Form (TA6): A detailed overview of the property, including any disputes, planning permissions, or warranties.
- Fixtures, Fittings, and Contents Form (TA10): A list of what's included in the sale (e.g., appliances, curtains).
- Leasehold Information Form (TA7): If the property is leasehold, this document is required.
- Proof of Identity Details: Instructions for verifying your identity, along with a list of acceptable documents to provide (e.g., passport, utility bills).

# Your Welcome Pack To-Do List.

You'll need to review, complete and return the following items:

- Sign and return the Terms of Business form.
- Sign and return your Fee Estimate. This confirms that you've reviewed and accepted the associated costs.
- Complete and return the New Client Form so your solicitor has your details.
- Complete the ID Verification form and provide the necessary proof of identity documents (e.g., passport, recent utility bill).
- Return the TA6 Form.
- Return the TA10 Form.
- Submit the TA7 Form (if applicable for leasehold properties).
- Provide your payment on account.

# Quick Tips for Completing Your Welcome Pack.

- Double-check everything: Ensure all forms are completed accurately. Mistakes might result in delays
- Ask for help: Unsure about a section? Contact your solicitor—there's no such thing as a silly question.
- Be prompt: Aim to submit within 7 days to keep the process moving.
- Keep copies: Retain copies of everything you send for your records.

# Actions to complete:

## Homeowner:

ID to solicitor

Welcome Pack Received

Welcome Pack Return to Solicitor

## Homeowners Solicitor:

ID received

Welcome Pack Sent

Welcome Pack Received

## Update Milestones:

Mark the milestone as complete in your portal to notify everyone.

Tick it off your checklist.

# Important Disclaimer.

The materials in this guide are provided for general information purposes only and do not constitute legal or financial advice. Whether express or implied, no warranty is given, nor shall Sheldon Bosley Knight Estate Agents Limited be liable for errors, omissions, or content on associated weblinks.

For personalised advice, consult your legal or financial advisor.

We look forward to assisting you every step of the way! If you have any further questions, please don't hesitate to reach out.



# Final message from the team.

The Welcome Pack is a vital part of the conveyancing process. It includes all the necessary forms and documents your solicitor needs to progress the transaction securely and efficiently.

Aim to review, complete, and return all forms within seven days to avoid delays. You'll also need to sign the Terms of Business and accept the Fee Estimate. Double-check all details, keep copies for your records, and contact your solicitor if you have any questions. Prompt and accurate completion is essential to keep the process on track.

Got any ideas on how we can improve this guide? Please share them - [marketing@sheldonbosleyknight.co.uk](mailto:marketing@sheldonbosleyknight.co.uk)

MIKE AND THE  
SHELDON BOSLEY  
KNIGHT TEAM

