

Campions Solicitors
Instruction form
Staircasing

IMPORTANT: Please ensure that all spellings are correct since **full names** will be inserted into legal documents. This form and attachments are fairly long. However, once completed, it should provide us with almost all relevant instructions.

Client One		Client Two	
Title:		Title:	
Surname:		Surname:	
Forename(s):	<i><u>(please include all names as stated on your passport including middle names)</u></i>	Forename(s):	<i><u>(please include all names as stated on your passport including middle names)</u></i>
Telephone: Mobile:		Telephone: Mobile	
Telephone: Home		Telephone: Home	
Telephone: Other		Telephone: Other	
National Insurance Number:		National Insurance Number:	
Date of Birth:		Date of Birth:	

Client one	Client two
Email address: We prefer to send documentation by email throughout the transaction to avoid delays. Please therefore ensure that you check your emails on a regular basis.	Email address: We prefer to send documentation by email throughout the transaction to avoid delays. Please therefore ensure that you check your emails on a regular basis.

Authority to Act
We prefer to use one client as a contact. Please state which of you we should contact: (If relevant)

Address of property that you are staircasing up on (any letters will be sent to this address, although generally email is used):

Premium agreed for the staircasing:
£

Please give the percentages for the staircasing:

From %

To %

Are you able to send a copy of the original lease?

Yes

No

If Yes please attach. There is then a £3.60 Inc VAT reduction in the title documents payment otherwise £18 Inc VAT.

SDLT (STAMP DUTY):

Are you aware of any stamp duty previously paid on the initial purchase or any subsequent staircasings:

YES NO

Details if known:

Potential Transfer of Equity

Is the property being staircased up in one name and the eventual ownership being in two names?

YES NO

If so there should be a transfer of equity. There are both costs implications and possible SDLT implications. Please comment further on any plans you have.

The Housing Associations details:

Name:

Contact:

Tel No:

Email:

The name of their Solicitor if known:

Solicitors
Ref or name of individual case worker if known

Is anybody contributing towards the purchase price? Yes No

If yes please state the amount £.....

Please state your relationship to the provider of the contribution (i.e they are your parents)

.....

Please provide their full name (including any middle names), address and email address:

Name (s)

Address

.....

Email

Is this regarded as being a gift or a loan? Gift Loan

If there is a contribution (whether a gift or a loan) please state whether this has been disclosed to the mortgage lender. Yes No

If no, this must be done immediately. Please confirm that you will do this immediately by;

Contacting mortgagees direct

Or;

Through financial advisor

Please note that we will have to carry out a bankruptcy search against any parties providing sums of monies and this will incur a charge of £2.40 Inc VAT

PLEASE PROVIDE EVIDENCE OF THE SOURCE OF FUNDS. Delays in providing such evidence may lead to delays in your case. By way of further guidance we provide the following.

- **Savings:** if the source is savings please provide the last 3 months statements for all accounts where the savings are held.
- **Inheritance:** please provide documentary evidence in the form of letters or other documents.

PLEASE NOTE THAT WE ARE SUBJECT TO STRICT REGULATIONS ON THE

TRANSFER OF FUNDS.	
In the event of any questions on this please email: ssteel@champions.co.uk gevans@champions.co.uk	

Mortgage and Finance

Are you staircasing with the aid of a mortgage?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, is this a new mortgage?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you redeeming an existing mortgage?	Yes <input type="checkbox"/> No <input type="checkbox"/>

In all cases please give:

Name of Existing Mortgage lender	
Address/branch	
Account Number	
Name of new Mortgage lender:	
Address/branch	
Application Number:	

Will anyone over the age of 17 (who is not a buyer) be living with you at the property?

YES NO

If so, please supply their full name(s) address and ages:	Name(s)
	Current Address

	Age(s)

Have you informed the Lenders? (The reason for this is because any adult occupiers may have an interest in the property and therefore need to consent to the mortgage before completion)	YES <input type="checkbox"/> NO <input type="checkbox"/>
	If no, this must be done immediately. Please confirm that you will do this immediately by;
	Contacting mortgagees direct <input type="checkbox"/>
	Or;
	Through financial advisor <input type="checkbox"/>

Authority to pay by electronic bank transfer
There are occasions when we shall need to pay clients. Accordingly we would ask you to complete the following authority. Please note that we shall still need payment for disbursements and costs authorised from you and we cannot take money from this account.

I, we _____instruct Campions to pay any balance due to me/us by electronic bank transfer.

I require a same day payment (CHAPS) and understand that I will be charged the sum of £37.00 in total. This includes VAT, the bank's charges and Campions' fees for processing the payment.

I require a BACs payment. I understand that there is no charge for this service. Whilst the payment will be made by Campions on the date of completion, the payments may not reach my account for up to four working days (but may well be before).

My/our bank details are as follows:

Name of account holder _____

Account Number: _____

Sort Code: _____

Bank Name: _____

Bank Address: _____

Signed: _____

Signed: _____

Under the Law Society Protocol we are sometimes required to disclose information as to your financial arrangements and the position on your staircasing to the Housing Associations solicitors, any lender involved and any Solicitors acting for the lender. Please confirm that you have no objection:

YES NO

Special Requests for completion dates/Valuation expiry date if known:

Conflict

I am not in a legal conflict (including relationship issues) with any other person/I am in such a conflict with (please provide name)Please delete what does not apply.

This information is confidential but if we act for that person we may not be able to act for you.

We would be grateful if you tell us how you first heard about us. This is important because it helps with our marketing:

Existing Client

Internet

Recommendation

(if professional please specify):

Other

(Please specify)

We also offer a Will service of £95.00 inc VAT for a single Will or £140 inc VAT for a double Will. Please indicate here if you would like us to send you a will pack:

Yes, please send me a Will pack