

Campions Solicitors
Instruction form
Purchase

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>(please include all names as stated on your passport including middle names)</i> | Forename(s): | <i>(please include all names as stated on your passport including middle names)</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 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. | 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. |
|---|---|

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

| |
|--|
| Your current address: (we will send all of your correspondence to the address stated here, although generally emails will be used) |
|--|

| |
|---|
| Address of property that you are purchasing: |
|---|

| |
|------------------------|
| Purchase price: |
|------------------------|

£

Have you agreed to pay any money to the sellers for fixtures and fittings?

Yes No

If yes, please state full amount: £

Are there any estate agents involved with your purchase:

| | |
|---------|--|
| Name: | |
| Branch: | |
| Tel No: | |

If there are no estate agents, please give the name and telephone number of the seller and if known the solicitors and a reference:

| | |
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| Sellers | Solicitors Ref or name of individual case worker if known |
|----------------|---|

If you are purchasing a flat, please let us know if you believe any alterations have been made. If yes, please give details:

| | |
|--|--|
| Mortgage and Finance | |
| Are you buying with the aid of a mortgage? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| If yes, has an application been made? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| If an application has been made has an actual mortgage offer been received or made in principle? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| Mortgage Panel Number | |
| Please note that if you are using the Derby Office all Mortgage offer need to be addressed to the Nottingham Office. Please give the Nottingham Office address details on your mortgage application. | |
| Has a survey already been carried out? | Yes <input type="checkbox"/> No <input type="checkbox"/> |

In all cases please give:

| | |
|--|--|
| Name of Mortgage lender | |
| Address/branch | |
| Application Number | |
| Whether or not you are having a mortgage are you instructing your own surveyor? | |
| (We would always recommend this since a lenders survey | |
| Yes <input type="checkbox"/> No <input type="checkbox"/> | |

| | |
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| is quite limited and the surveyor is not legally responsible to you). | |
| Have you obtained quotes for buildings insurance? (we would advise you at this stage that the terms of the policy must comply with the lenders <u>requirements</u> and that the property must be insured on or before exchange of contracts) | Yes <input type="checkbox"/> No <input type="checkbox"/> |

Deposit

At some stage, you will be asked for a deposit. When you have signed all the relevant documentation and we have dealt with all the outstanding issues, we shall contact your sellers' solicitors to affect exchange of contracts. At that time, the completion date (to which you will have previously agreed) becomes fixed and all parties will be tied in to completing on that date. Your deposit will then be either sent to the solicitors or will be held by us and forwarded to them with the rest of the purchase funds.

It is important that you fully appreciate that if you change your mind after we have exchanged and you decide that you no longer wish to proceed with your purchase, you will not get your deposit back. In addition, should the deposit be less than 10% of the purchase price, not only do the sellers' solicitors keep the deposit but they can sue for the balance and you will become liable for other sums of money.

| | |
|---|---|
| What arrangements have been made regarding the deposit? (i.e. are you paying 10% or less) | |
| Are you paying for the fees and deposit from your own funds or is money being provided from a dependant sale? Please give details here: | |
| If the deposit is being provided by you in total or in part, please provide estimated amount | £ |
| Please state the source of funds. | Savings <input type="checkbox"/> Inheritance <input type="checkbox"/> Remortgage of another property <input type="checkbox"/> Sale/ transfer of a previous property <input type="checkbox"/> Sale/ transfer of a linked property through Campions <input type="checkbox"/> Other <input type="checkbox"/> Please Specify: If more than one source please complete for each |

HTB Loan (are you obtaining or repaying an HTB loan?)

Yes No

If obtaining please give full details of the amount:

Please also state your plans on how you might repay the loan:

If you are redeeming a loan please confirm below that you will immediately contact **myfirsthome.org.uk**.

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** - A copy of the letter from the executors or their solicitors stating how much is being paid to the client as beneficiary and a copy of the bank statement showing the money being received from the solicitor/executor's bank account.
- **Remortgage or sale transfer of previous property:** in all these cases please provide a copy of the completion statement from the solicitor and a copy of the bank statement showing the money being received from the solicitor.
- **Property being sold and linked:** if you are selling through this firm and are not putting any funds in then you will not need to provide evidence of source of funds.
- **Pension Release:** Copy pension statement and a copy of the bank statement showing the money being received from the pension company.
- **Sale of Shares:** A copy of the share release schedule and a copy of the bank statement showing the money being received from the company.
- **Dividends from a UK Company:** A copy of the dividend certificate, a copy of the company accounts and a copy of the bank statement showing the monies being received from the company. If you are unable to provide this information please contact us so that we can discuss this matter further with you.

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@campions.co.uk

If there are two people buying please provide the estimated proportion being contributed by each person

If you can, please give an early indication of how you intend to own the property in line with the attached sheet "Joint Ownership Information". (we can discuss this with you at a later date if you are not sure at this stage).

Joint Tenants
Tenants in common – equal shares
Tenants in common – unequal shares
Not sure

Is there going to be a contribution towards the purchase from a third party (i.e. a parent)
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

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 NO

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

| | |
|--|---|
| | Contacting mortgagees direct <input type="checkbox"/> |
| | Or; <input type="checkbox"/> |
| | Through financial advisor <input type="checkbox"/> |

What do you intend to use the property for?

Main Residence
Buy to Let

Other, please specify

Are you in rented accommodation?

YES NO

If you are in rented accommodation, please state if there is a date that you have to leave or provide any other arrangements: (please note that you should be careful about handing in your notice without an exchange of contracts):

Do you want us to carry out searches or wait for the survey or mortgage offer? Please specify. (If you wish us to carry out searches now you will need to arrange the payment of search fees as set out in the attached letter).

Carry out searches
Wait for survey/mortgage offer

Please note we cannot carry out searches until we receive a plan from the sellers' solicitors. Some searches can take approximately 2 weeks to get back. **Please do not pay for searches until they are required.**

Do you need to sell a property before proceeding with the purchase?

Yes No

If yes are you using Campions to deal with the sale Yes No

If no, please provide the details of the solicitors you are using to deal with the sale:

Name

Address

Telephone

Reference

| | |
|---|--|
| Has an offer been accepted on your property? | YES <input type="checkbox"/> NO <input type="checkbox"/> |
| Are you aware as whether there is a chain on your sale and if so, please provide details: | |

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 sale to the sellers solicitors. Please confirm that you have no objection:

YES NO

Special Requests for completion dates:

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