

VENDOR

e-dealing workflow check list

Primary Contact (PC)	
Conveyancing Professional (CP)	
Checklist Author (A)	

e-dealing No.	
Client	
File reference	
Settlement date	
Prior Manual Dealing No.	

1. Dealing details

Registered Proprietor..... Title Reference(s).....

Purchaser's PC..... Ph..... email.....

Purchaser's CP

Discharge No.1..... Mortgagee

Discharge No. 2..... Mortgagee.....

Withdrawal No. 1..... Caveator.....

A/CP signature..... Date.....

2. Sign e-dealing

PC	A/CP	Discharge
<input type="checkbox"/>	<input type="checkbox"/>	Title references, Discharge Mortgage numbers and Mortgagee name details have all been confirmed against the documentation and search records
<input type="checkbox"/>	<input type="checkbox"/>	Institutional discharge held or A&I forms completed - alternate CP specified if required
<input type="checkbox"/>	<input type="checkbox"/>	e-dealing details eg Reservation of Personal Covenants are correctly entered (Failure due to prior manual dealing?)

PC	A/CP	Transfer
<input type="checkbox"/>	<input type="checkbox"/>	Title references and transfer details have all been confirmed against the documentation and search records
<input type="checkbox"/>	<input type="checkbox"/>	Transfer A&I forms completed – alternate CP specified if required
<input type="checkbox"/>	<input type="checkbox"/>	e-dealing details are correct including Fencing Covenant where appropriate
<input type="checkbox"/>	<input type="checkbox"/>	Instruments have been Pre-Validated (Failure due to prior manual dealing?)

PC Checklist of attached documentation for CP - where appropriate:

- | | |
|---|---|
| <input type="checkbox"/> Current Guaranteed Search Note | <input type="checkbox"/> Non revocation completed by Attorney |
| <input type="checkbox"/> Print of the draft Discharge(s) | <input type="checkbox"/> Print of the draft Transfer |
| <input type="checkbox"/> Original DM from Institution | <input type="checkbox"/> A&I (Transfer) with photo ID |
| <input type="checkbox"/> Institutions letter relating to personal covenants | |

PC signature Date.....

The e-dealing is signed and is ready to Release - CP signature Date.....

3. Release discharge of mortgage and transfer to purchaser

Settlement has taken place and the documents are in order for release to the purchaser

A/CP signature Date.....

PC

The e-dealing has been released PC's signature Date.....