



Welcome to Your Property Investment Journey.

Whether you're new to investing or adding to your portfolio, this guide outlines the exact steps we'll take to help you secure a strong, hands-off property deal — from your first call with us right through to refurbishment and rental readiness.

Our goal is to make the process smooth, clear, and compliant — while saving you time and keeping your risk low.

Use this as your reference throughout the journey. And remember, we're just a phone call or email away if you need support at any stage.

Step 1: Planning & Preparation

- We begin with a quick call to learn about your investment goals, timeline, and budget.
- You'll complete a short questionnaire to clarify what types of properties and returns you're after.
- If you need, we'll introduce you to our trusted partners — mortgage brokers, solicitors, and surveyors.
- You'll provide basic documents:
 - ✓Proof of ID
 - ✓Proof of address
 - ✓Proof of funds
 - ✓Mortgage Agreement in Principle (if applicable)
- A £100 due diligence fee is paid to cover identity verification and Anti-Money Laundering (AML) checks.

Step 2: Property Search & Selection

- Once we've verified your documents and passed AML checks, the property search begins.
- You'll receive handpicked opportunities that match your criteria.
- You can ask questions, request additional details, and once ready — select a property to pursue.
- To secure the deal, a commitment fee is paid, and we submit an offer on your behalf.

Step 3: Offer Accepted & Deal Setup

Once your offer is accepted, you'll receive the Heads of Terms setting out the key details of the transaction.

At this stage, we'll:

- Introduce you to your solicitor (or liaise with your existing one) to formally instruct them.
- Share all relevant documentation with the legal team to allow them to begin the conveyancing process promptly.
- Coordinate with the seller's solicitor to ensure contracts, title documents, and legal packs are exchanged efficiently.
- Guide you through any preparatory steps required for smooth progression to exchange, including ID verification, AML clearance, and client onboarding with your solicitor.

This ensures your legal team is fully equipped to act swiftly, protecting your interests and avoiding unnecessary delays.

Step 4: Legal Process & Refurbishment Planning

- Your solicitor begins the legal process: reviewing contracts, ordering searches, and progressing toward exchange.
- You'll arrange for your mortgage valuation and survey.

Refurbishment Planning if applicable,

- Our refurbishment team will inspect the property and provide a detailed scope of works.
- You'll review and approve the refurb plan. Nothing starts without your sign-off.
- We keep you updated every week — clear, no-fluff updates.
- We'll also guide you on arranging buildings insurance, reviewing legal documents, and preparing for exchange.

Step 5: Pre-Exchange Final Steps

- Your solicitor will hold the balance of our sourcing fee, to be paid upon exchange.
- Final introductions are made to your chosen contractor team for the refurbishment work.

Step 6: Completion & Refurb Execution

- On completion day, keys are collected and the refurb begins.
- You'll receive regular photo and video updates — so you can stay informed without being hands-on.
- We project manage everything, keeping your time and stress to a minimum.

