

sheet which will authorise you on their behalf to exchange contracts by reference to the Law Society's Formulae for Exchange (this is discussed in detail later in this Unit).

Task 6

Obtain a copy of your firm's interview checklist and see how you could improve on it. If your firm does not have one, design your own.

2.3 Preparing a Written Report

Seeing your client face to face is the ideal way to discuss the information that you have discovered through your investigations. However, clients are increasingly busy and they do not want to spend time visiting the conveyancer's office. In addition, clients often instruct firms in a different location because they are referred to firms that estate agents and mortgage advisers have arrangements with. Increasingly, large volume conveyancers, who are not the client's local conveyancer, provide conveyancing services. In these cases, the report to the client is, normally, provided in writing.

When reporting in this way, it is essential to provide in writing the advice that you would have given had you seen the client in your office. It is common for a firm to use a standard precedent report. Commonly, copies of all the results of searches and enquiries, together with copies of title documents and the title plan will be provided to the buyer.

It is important that any significant matters are fully explained, as it is not sufficient simply to provide the information without an explanation as to what it all means. When there are difficult issues it is best to call the client to discuss them. It should always be remembered that you are likely to be dealing with lay people and explanatory language should be easy to understand and you should avoid 'jargon'.

For example, if the 'official copy entries', reveal that the property is subject to various restrictive covenants then an explanation of how your clients should comply with these covenants should be given. You should also find out if the covenants restrict something the client particularly wants to do with the property such as work from home, keep pets or put up a satellite dish.