



THE VALUQ HOMEOWNER SERIES

The Document Gathering Checklist

Every document your solicitor and the buyer's solicitor will ask for. Get them ready before you list and you can shorten the sale by weeks.

SECTION 1

Proof of ownership

The paperwork that proves the house is yours to sell.

Land Registry title deeds (official copy).

If you have a mortgage, the lender holds the original. You can buy an official copy at gov.uk/land-registry for under 10 pounds. The buyer's solicitor will request this.

Property freehold or leasehold register entries.

Same Land Registry source. Confirms whether the property is freehold, leasehold, or shared freehold.

Lease document (if leasehold).

The original or a certified copy. Buyers and lenders check the remaining term. Anything under 80 years can affect mortgage offers.

Share certificate (if share of freehold).

Held by the management company or the freehold-owning resident group.

SECTION 2

Energy and safety

The certifications that must be valid before the property can be marketed.

Energy Performance Certificate (EPC).

Required by law before listing. Valid for 10 years. Check the date at gov.uk/find-energy-certificate. Order a new one through any accredited assessor if needed.

Gas Safety record (CP12).

If the property is currently let, this must be current. For owner-occupied homes, the buyer may request the most recent boiler service record instead.

Boiler service history.

Most recent service certificate plus any prior records you have.

Electrical Installation Condition Report (EICR).

Not always required for owner-occupied sales, but increasingly requested. Mandatory for let properties.

Smoke alarm and carbon monoxide alarm placement record.

Especially important if any work has been done to the property.

IF YOUR EPC IS OLDER THAN 7 YEARS

Energy ratings methodology has changed. An older certificate may show a worse rating than your home would score today. Worth ordering a fresh one if your current rating is a D or below.

SECTION 3

Work done to the property

Buyers' solicitors will ask for sign-off on any work done since you bought the home. Gathering these now prevents painful delays at exchange.

 Building regulations completion certificate for any extension.

Issued by the local authority or an approved inspector when an extension is finished.

 Building regulations for loft conversion.

Including the structural calculations from the engineer if relevant.

 FENSA or CERTASS certificate for replacement windows.

Required for any windows installed since April 2002.

 Building regulations for boiler replacement.

The installer should have issued this. If missing, a Gas Safe registered engineer can confirm compliance retrospectively.

 Planning permission documents.

For any extension, loft, garage conversion, change of use, or external alteration. Available from your local authority planning portal if missing from your records.

 Party wall agreements.

For any work on a shared boundary, including loft conversions, extensions, basement work, or boundary repairs.

 Structural engineer reports.

Any structural work (steel beams, underpinning, load-bearing wall removal) should have a sign-off from a chartered engineer.

SECTION 4

Warranties and guarantees

Items you are leaving behind that still have active guarantees. Each one is a small mark of confidence for the buyer.

- Boiler warranty.**
Typically 5 to 10 years for a new install. The transferable warranty is a meaningful selling point.

- Double glazing or window warranty.**
Typically 10 years. Most are transferable on sale.

- Damp-proofing or timber treatment guarantee.**
Often 20 or 30 years. Many lenders ask for this if the property has known damp history.

- Roof warranty.**
If the roof has been replaced or significantly repaired in the last 25 years.

- NHBC, LABC, or other new-build warranty.**
If the property is under 10 years old. Transferable to the buyer.

- Appliance warranties for items being left.**
Cooker, hob, hood, washing machine, dishwasher, fridge, freezer. If any are still under warranty, include the paperwork.

- Alarm system contract.**
And any current monitoring service details.

- Solar panel installation, ownership, and FIT documents.**
Critical if the panels are leased rather than owned. Lease terms can affect mortgage offers.

SECTION 5

Leasehold-specific (if applicable)

Skip this section for freehold properties. Leaseholders, expect to be asked for all of the following.

- Most recent service charge accounts.**
Usually the last two or three years. From the freeholder or managing agent.

- Ground rent demand and proof of payment.**
Most recent year.

- Buildings insurance schedule and certificate.**
Held by the freeholder. Confirms current cover.

- Sinking fund or reserve fund balance.**
What the building has set aside for major works.

- Section 20 notices for any planned major works.**
Lifts, roofs, communal heating, exterior decoration. These can run into thousands per leaseholder.

- Recent AGM minutes and any leaseholder correspondence.**
Anything that hints at ongoing disputes or planned changes.

- Right to Manage (RTM) status if applicable.**
Confirms which legal entity manages the building.

SECTION 6

Tax, fees, and recurring costs

The financial picture the buyer needs to see for full disclosure.

- Council tax band confirmation and most recent bill.**

- Water company name and any annual statement.**

- Energy supplier and a recent bill for each utility.**

- Broadband provider and contract details.**

- Stamp duty paid when you bought the property.**
From the HMRC SDLT5 certificate. Useful if the buyer asks.

- Any service or maintenance contracts.**
Boiler cover, security monitoring, garden maintenance, pest control.

SECTION 7

Disputes, claims, and disclosures

These are the items the TA6 Property Information Form will ask about. Sourcing the paperwork in advance shortens the sale meaningfully.

- Any flood-risk reports or insurance correspondence.**
If the property is in a flood-risk area or has flooded historically.

- Subsidence reports or monitoring records.**
If there has been any settlement or movement, including engineer assessments.

- Boundary dispute correspondence.**
Any past or current dispute over fence lines, hedges, or party walls.

- Neighbour disputes or anti-social behaviour complaints.**
The TA6 asks about this directly. Honest disclosure protects you legally after sale.

- Tree preservation orders or conservation area status.**
If the property is in a conservation area, listed, or has TPO trees.

- Rights of way, easements, or shared access agreements.**
Anything that affects how the property is used or accessed.

- Insurance claim history.**
Especially anything within the last 5 to 10 years.

THE HONESTY TEST

The TA6 Property Information Form is a legal document. Misleading answers can void the sale or expose you to a claim from the buyer after completion. When in doubt, disclose. Your solicitor will help you word anything sensitive correctly.

Compare what your home is worth

ValuQ gives UK homeowners free, side-by-side property valuations from competing local estate agents. You stay anonymous until you choose otherwise. The agent competes on merit.

No cold calls. No data sales. No pressure. Free, always.

[Get my free valuation](https://valuq.co.uk/get-valuation)

<https://valuq.co.uk/get-valuation>