

PURCHASER *Information Pack*



ABOUT THE TRANSFER PROCESS
& WORKING WITH ME

TENEILLE MASSYN

YOUR CONVEYANCER

Nice To Meet You

I'M EXCITED FOR US TO WORK TOGETHER



Welcome!

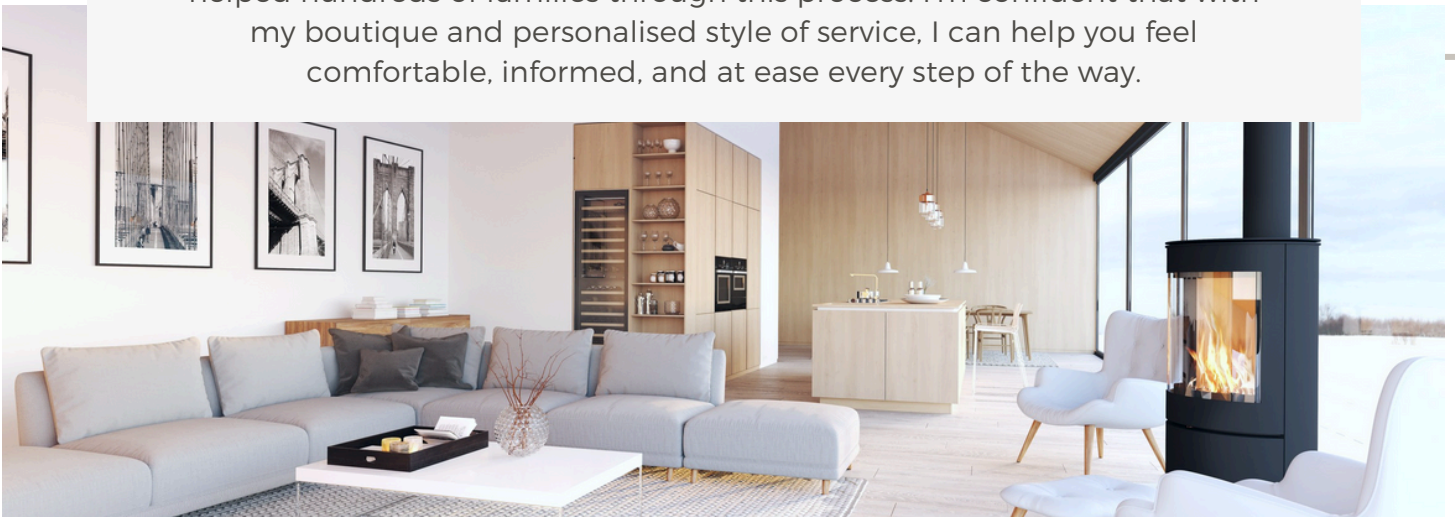
JUST A FEW THINGS I WANT YOU TO KNOW...

Purchasing property can be an overwhelming and stressful process but I am here to guide you through this each step of the way and make this as smooth, efficient and stress-free as possible. As there are many milestones and numerous parties involved in transfers, timing and communication are key to optimizing this journey. In this booklet, you will find a broad summary of the transfer process as well as what I require from you along the way in order to streamline the process.

I AM EXCITED TO

— *guide you through this journey* —

Drawing from over a decade of experience in the conveyancing field, I've helped hundreds of families through this process. I'm confident that with my boutique and personalised style of service, I can help you feel comfortable, informed, and at ease every step of the way.



TIMELINE

WHAT YOU CAN EXPECT AND WHEN

Let me walk you through a typical timeline for your property transfer journey. While each transfer is unique, this guideline will help you prepare for what's ahead. Keep in mind that steps 2 through 5 often overlap, as they involve ongoing processes of requesting figures, finalizing payments/conditions, and receiving documents/certificates from various entities for lodgement. These steps work in tandem to ensure all necessary paperwork is in order. Remember, this timeline is flexible and may adjust to fit your specific situation.



CONTRACT RECEIVED

I receive your contract, send initial letters and information booklets out to seller/s and purchaser/s and request the information and documentation that is required to process the transfer. Once the contract is PERFECTA (irrevocably concluded), we can continue to the next steps.

PERFECTA

BOND APPROVAL
AND (if applicable)
DEPOSIT PAID/GUARANTEED

OR

FULL PURCHASE PRICE PAID/GUARANTEED



RATES AND LEVY CERTIFICATES

I will be contacting the Seller/s city council and, if applicable, body corporate or homeowners association to request clearance certificates for transfer. They'll issue us figures for payments needed, usually estimated for about 3 months ahead to cover the transfer period. Once your seller has paid these amounts and met all their conditions, I'll receive the necessary certificates in order to lodge at the Deeds Office.

1

2



BOND CANCELLATION & BOND REGISTRATION

As part of the transfer process, your Seller/s existing bond will need to be cancelled while YOUR new bond is simultaneously registered. This involves multiple attorneys, each handling a specific aspect of the transaction. As your transfer attorney, I'll act as the central point of contact, coordinating between all parties, including the bond cancellation and bond registration attorneys.

Here's how the process typically unfolds:

- I'll request bond cancellation figures from the Seller/s bank, who will then appoint a bond cancellation attorney to issue figures.
- Once I receive these figures, I'll request a guarantee for this amount from your bond registration attorneys that have been appointed by your bank. (In a cash sale, this guarantee would come from your investment instead.)
- At this point, your bond documents will be drafted for signature at your bond attorney's office.
- After signature, the guarantees will be issued from your bond attorneys to secure the seller/s' cancellation of their current bond and allow us to all continue with the transfer of the property.

3



SIGNATURE OF DOCUMENTS

Upon receipt of all necessary figures from steps 2-4 (though not necessarily all certificates), I will arrange for the signing of documents with both the seller(s) and purchaser(s). This approach ensures that you need only sign once, with all pertinent information at hand. To accommodate your schedule and preferences, I offer flexible signing options. Whether you prefer to sign at your home, office, or even over the weekend, I am committed to making this process as convenient as possible for you.



LODGEMENT AND REGISTRATION

The next step is lodgment at the Deeds Office. I'll coordinate this process with the Seller/s bond cancellation attorney and your bond registration attorney. Once lodged, the deed will go through three levels of examination at the Deeds Office before reaching registration on approximately day 8-12 after lodgment. Upon successful registration, I'll promptly notify you and provide post-registration instructions.

4

5

6

7



SARS TRANSFER DUTY

An important step in the process is dealing with SARS (South African Revenue Service). I'll submit all the transaction details to them to obtain a transfer duty declaration (which will be part of the pack of documents you will sign with me). Once SARS reviews and approves these details, they'll issue the declaration. At this point, you will be required to pay the transfer duty amount into trust. SARS will then provide a receipt which is essential for lodgment at the Deeds Office.



FINAL CHECKS

The following final checks must be completed prior to lodgment at the Deeds Office:

- Guarantees received from bond attorneys
- Guarantees delivered to and approved by bond cancellation attorneys
- Rates Clearance Certificate Received
- Levy Clearance Certificate Received
- Contractually obligated certificates received E.G. electrical compliance, gas compliance, beetle certificate or electric fence compliance.
- SARS Transfer Duty Receipted
- Documents signed and checked
- Finances checked
- Final bond and bond cancellation "go-ahead" from banks received
- Deeds Office Lodgment pack prepared

About Me

MY COMMITMENTS AS YOUR CONVEYANCER

01 FREQUENT COMMUNICATION

You will receive a weekly progress report detailing the steps attended to in that week and what to expect going forward. And if there is anything urgent that needs to be attended to, I will ensure that it is communicated to you in real-time via the communication channel/s that suit you best.

As your conveyancer, I am the middle man who will coordinate different players to achieve a smooth successful transfer and I will ensure that all parties including YOU are kept up to date throughout.

KEEP YOU IN THE LOOP WITH FINANCES

Upon receipt of your contract, I will issue you with a pro forma account which includes all fees for the transaction. All fees on the pro forma are standardised and issued to us as conveyancers by the law society guidelines for fees. The disbursements will differ for each transaction but I will gladly answer any queries on your personal pro forma. I will also send a final account to you upon registration noting all items in one comprehensive statement as follows:

- All funds received from you in trust
- Disbursements (e.g. SARS transfer duty, levies in advance)
- Our conveyancing fees

03 SECURE YOUR PERSONAL INFORMATION

Your personal information that is provided to me is kept securely on file and is only provided to parties that are essential to the transfer process eg SARS, Body Corporate, Deeds Registry

YOU ARE NOT JUST A NUMBER

You will never be just a number or just a file to me, I pride myself in going the extra mile and tailoring the experience to suit you as my client to make this a positive time. I truly care about this move that you are making because I know that buying a home is a significant and emotionally charged decision. Purchasing a home or even an investment property is often the start of an exciting new chapter in your life, and I'm honoured to play a part in it.

As your conveyancer
**I MAKE IT MY TOP PRIORITY TO GIVE YOU AN
EXCEPTIONAL CLIENT EXPERIENCE**

About You

QUESTIONS TO HELP ME GET TO KNOW YOU

SECTION 1 COMPANY/TRUST INFORMATION

Company/Trust Name and Registration Number: _____

Company/Trust address: _____

Representative Full Name and Identity Number: _____

Representative Residential address: _____

Phone Number/s: _____

Email address/es: _____

Company/Trust Income Tax Number: _____

SECTION 2 ABOUT THE PROPERTY

For what purpose will the purchased property be used?: _____

Do you need to sell or have you sold your current property in order to continue with this purchase?

☐ Yes

☐ No

If yes, is this still in the process of being sold or has the transaction been allocated to an attorney?:

☐ Still in process

☐ Allocated to attorney

Agent or Attorney name: _____

Agent or Attorney contact details: _____

SECTION 3 PREFERENCE OF COMMUNICATION

☐ Phone Calls

☐ Text Messages

☐ Email

☐ Whatsapp

*you are more than welcome to select more than one option



What I Need From You

TO GET YOU STARTED ON YOUR HOME JOURNEY

It takes a staggering amount of paperwork to buy a house. Your head might be swimming keeping track of it all, but don't worry! I will collect and monitor much of the paperwork. To get started with any transfer, we will need the following documents from you:

COMPANY DOCUMENTS

- 01 Copy of COR1, COR9(if applicable), COR22 and COR29, CIPC Confirmation Certificate as well as Copy of MOI
- 02 Vat and Income Tax numbers
- 03 In respect of each director, each authorized person, and each shareholder holding more than 25% of the voting rights of the company:
 - Certified Copy of the Identity document
 - Proof of residential address
- 04 Proof of Banking Details (for the proceeds to be paid into)

OR

TRUST DOCUMENTS

- 01 Copy of the Trust Deed and Letters of Authority
- 02 Income Tax number for Trust
- 03 In respect of the Founder, each Trustee, each authorized person, and each beneficiary of the Trust:
 - Certified Copy of the Identity document
 - Proof of residential address
- 04 Proof of Banking Details (for the proceeds to be paid into)



“ TO HELP ME SERVE YOU BETTER, I ALSO KINDLY ASK FOR
YOUR FULL COMMITMENT THROUGHOUT YOUR *transfer journey!* ”

The Purchaser's Expenses

WHAT EXACTLY DO YOU NEED TO BUDGET FOR

01

TRANSFER ATTORNEY FEES

As the Purchaser/s, you are liable for the conveyancing fees charged by myself as your transfer attorney. A guideline of fees are issued to us as conveyancers from the legal practice council which sets the parameters to ensure you are not being overcharged. These fees are calculated on a sliding scale according to the purchase price of the property. Should you wish to query these amounts, I will gladly provide more information.

DISBURSEMENTS

You will find disbursements and estimated disbursements on your pro forma statement which could include one or more of the following depending on your specific transaction:

- Transfer Duty to SARS - calculated as per SARS sliding scales
- Deeds Office Registration fee - calculated as per the Deeds Registry
- Estimated Levies in advance - if applicable (this will be credited to your new levy account upon registration).

02

03

BOND REGISTRATION ATTORNEY FEES

The same guideline of fees is followed for the bond registration attorney fees. This is calculated on a sliding scale and is separate to the transferring attorney fees as the bond attorney only deals with the mortgage registration between you and the bank. If this is a cash transaction, then you will only be dealing with me and the bond registration fees will not be applicable.

PURCHASE PRICE FOR THE PROPERTY

The purchase price of the property will be paid in one of 3 ways:

- Deposit paid into trust for safekeeping along with Bond Guarantees to be paid by the bond attorneys into trust upon date of registration
- Full Purchase Price paid into trust for safekeeping until date of registration
- Full Bond Guarantees to be paid by the bond attorneys into trust upon date of registration

04

Additional Notes

FOR IF YOU HAVE FURTHER INFORMATION OR QUERIES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

I'M SO EXCITED TO WORK TOGETHER
& I CAN'T WAIT TO GET STARTED

- TENEILLE MASSYN | YOUR CONVEYANCER

HELPING YOU TO TRANSFER YOUR HOME!



Teneille Massyn
ATTORNEY, NOTARY, CONVEYANCER


THANK YOU


For choosing me for the task of transferring your home. You are in the best hands.



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