Completing a Transfer

Incoming Proprietor

Help Card

Create a new Workspace

Click Create New and add the following details:

> Select your Jurisdiction

> Select Transaction Type = **Purchase**

Note: This step is not applicable for ACT Workspaces. Proceed to select 'Role'.

You can click the tick box *to 'Make this my default Transaction Type'*. This is **optional**.

> Role = **Incoming Proprietor**

> Land Title(s) and Validate

> Subscriber Workspace Reference

> Financial Settlement Date and Time

The question defaults to *'Yes'* based on whether the Transaction Type would most likely include Financial Settlement.

> Mark all land title references in workspace as parent = **Yes/No**

> Transfer = **Yes**

> Request Land Title Data = **Now**

> Workgroup

> Click Save.

Or accept an Invitation

> Review the Invitation

> Select **Accept**

> Enter your Subscriber Workspace Reference

> Transfer? **= Yes**

> Workgroup

> Click Save**.**

Review Land Titles

> Navigate to the **Land Titles** screen

> Review the land title details returned from the Land Registry.

Create Party

> Navigate to the **Participants** screen

> Select Create Party

> Complete the outstanding details including date of birth and relevant addresses.

> Click Save.

Invite other Participants

(if not already in the Workspace)

> Select Invite Participant

> If required, invite Vendor's Representative as **Proprietor on Title**

> If a Mortgage is to be lodged, invite the **Incoming Mortgagee**.

> Complete the details and **Send Invitation.**

Create Transfer

If NSW, VIC or QLD, create, sign and lodge **Priority Notice** (if applicable).

> Navigate to the **Documents** screen

> Click Create Document ▾ > **Transfer**

> Complete outstanding details

> **Note:** Information may vary between jurisdictions

> Click Save.

PEXA

Important! The document will specify what address is required. Ensure you read and complete all mandatory fields.

Supporting Documents

- **If VIC,** Edit > edit the **Notice of Acquisition** and complete the document.
- **If NSW,** Edit > edit the **Notice of Sale** and complete document.
- **If QLD,** Edit > edit **Form 24 Part A** and complete document.
- **If WA,** navigate to **Property Information** and to complete outstanding details.

Enter Duty Information

It is your responsibility to prepare an application for a duty assessment.

- If **VIC** , Navigate to the **Stamp Duty** Screen and obtain reference numbers
- If **QLD**, navigate to the **Transfer Duty** Screen click **Enter Duty Information**
- **NSW, SA, WA**, after completing your duty assessment in the relevant online duties system jurisdiction, navigate to the **Stamp/Transfer Duty** Screen click **Enter Duty Information**
- If **ACT**, as per the Barrier free model, you will not pay Stamp Duty via PEXA. Please skip the *Enter Duty Information* steps in this Help Card.
- If **VIC/QLD**, after completing your duty assessment in the relevant online duties system jurisdiction, navigate to the **Stamp/Transfer Duty** Screen click > **Verify Duty.**

Edit Lodgement Instructions

(if Responsible Subscriber)

Only once all documents have been created:

- Click Edit > **Lodgement Instructions**
- Review order of lodgement
- If applicable, complete issuing instructions
- Click Save.

Sign Documents

- Click down arrow Sign > **View**
- Click Sign > **Sign Documents.**

Complete Financial Settlement Schedule

- Navigate to **Financial Settlement Screen**
- If there is an Incoming Mortgagee, complete the **Total Funds Required to Settle** in the Settlement Summary tab

The Incoming Mortgagee will confirm if they hold Client Authorisation to provide shortfall in the **Settlement Summary**.

Destinations

- Select **Destinations/Payments & Adjustments tab**
- Add **Adjustments** if applicable
- Add **Destinations** as applicable (e.g. water rates, professional fees etc)

If the Incoming Mortgagee is not providing for any shortfall, complete Source funds.

Sources

> Select the **Source Funds tab**

> Click **Add a Source >**

- **Category = Purchaser's Equity**

> Complete details and select 

> Click  > **Verify Funds**

> Click  > **Authorise Funds**

> Select  > **Sign** to digitally sign the settlement schedule.

Ensure the Workspace is at Ready status on the day of settlement