


Part Tenancy Transfers where **at least one existing Proprietor on Title is remaining on title.**


A Proprietor whose share is remaining un-changed does not need to be represented in the Workspace.

Create a new Workspace


Click  and add the following details:

- > Select Jurisdiction = **NSW**
- > Transaction Type = **Part Tenancy Transfer**

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

- > Role = **Proprietor on Title**
- > Land Title(s) and 
- > Subscriber Workspace Reference
- > Financial Settlement = **Yes**

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

- > Transfer = **Yes**
- > Request Land Title Data = **Now**
- > Workgroup
- > Click .

Or, Accept an Invitation

- > Review the Invitation
- > Select **Accept**
- > Enter your Subscriber Workspace Reference

- > Workgroup

- > Click .

Review Land Titles

- > Navigate to the **Land Titles** screen
- > Review the land title details returned from the Land Registry.

Represent Party

- > Navigate to the **Participants** screen
- > Locate the **Proprietor on Title** you represent

- > Click  > **Edit Party**

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

- > Click .


Complete the same steps if you represent multiple Proprietors on Title.

Invite other Participants

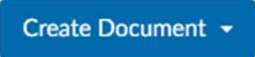



If there is Mortgagee on Title, Incoming Mortgagee or a new Transferee, invite them into the Workspace.

Note: If you represent a new Transferee (who is not an existing Proprietor on Title) navigate to Workspace Settings and add the role of Incoming Proprietor.

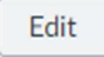
Only create new Transferees as an Incoming Proprietor. Do not recreate a Proprietor on Title as an Incoming Proprietor as they are already on title

- > Click  **Invite Participant**
- > Complete the details and **Send Invitation**.


Documents

- > Navigate to the **Documents** screen
- > Click  **Create Document** > **Transfer**
- > **Part Tenancy Details**, ensure to select **YES** to 'Is a Proprietor on Title staying on the Title?'
- > Select the Transferor that is transferring their share and click  **Add Transferor**
- > Repeat for all Transferors who are transferring their share
- > Confirm the proportion of shareholding being transferred is correct
- > Select the **Tenancy Type** for the Transferee/s
- > Select the party receiving the share and click  **Add Transferee**
- > Check final share distribution
- > Complete all mandatory fields and click  **Save**.

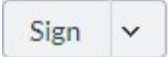
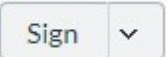

Supporting Documents

- > Click  **Edit** > edit **Notice of Sale** and complete document.

Complete Stamp Duty Assessment

- > Navigate to **Stamp Duty** screen
- > Note the Lodgement Case ID
- > Assess Stamp Duty in EDR and obtain **Duties Assessment Number (DAN)**
- > Once assessed, navigate to the Stamp Duty screen in PEXA and select **Enter Duty Information** > enter the DAN and click  **Save**

View and Sign Documents


- > Click down arrow  **Sign** > **View**
- > Select down arrow  **Sign** > **Edit** to update any of the details in a document
- > Click  **Sign** > Sign Documents.

Complete Financial Settlement Schedule

- > Navigate to **Financial Settlement Screen**

Destinations

- > Select **Destinations/Payments & Adjustments tab**


- > Add **Adjustments** if applicable
- > Add **Destinations** as applicable (e.g. Vendor Funds, water rates, professional fees etc).
- > Click  > **Sign** to digitally sign the settlement schedule.

Note: Unless you are providing Source funds, your steps end here.

- > Select the **Source Funds tab**


- > Click **Add a Source** >

- **Category = Other**

- > Complete details and click 

- > Click  > **Verify Funds**

- > Click  > **Authorise Funds**

- > Click  > **Sign** to digitally sign the settlement schedule.

Monitor the Workspace

- > Check that all documents are signed, and lodgement verification is successful
- > Financial settlement is correct, balanced and signed
- > The Workspace must be in **READY/READY** status for settlement to be successful.

For more information visit:

community.pexa.com.au