Transmission Application Direct to Beneficiary (NSW)

Help Card

Create a new Workspace

Click Create New and the following details:

- Select your Jurisdiction = **NSW**
- Role = **Incoming Proprietor**
- Land Title(s) and **Validate**
- Subscriber Workspace Reference
- Financial Settlement? = **Yes**
- Transfer? **= Yes**
- Request Land Title Data = **Now**
- Workgroup
- Click Save.

Review Land Titles

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

Mark Proprietor as Deceased

- Navigate to the **Participants** screen
- Locate the deceased proprietor/s
- For each deceased proprietor, select Edit Party > **Edit Party**
- Select **The Proprietor is Deceased** and enter **Details of Death.**
- Click Save.

Create Beneficiary

- On the **Participants screen** click **Create Party**
- Select **I Represent this Party**
- Complete details including **Party Capacity** and click Save.

Create Transmission Direct to Beneficiary

- Navigate to the **Documents** screen
- Click Create Document > **Transmission Direct to Beneficiary**
- Complete Applicant and Tenancy Details
- Complete Grantee Details (e.g. Executor/Administrator)
- Confirm you hold written consent from the Executor/Administrator

  Note: Primary Deceased refers to the Proprietor who passed away most recently
- Enter the **Evidence Details**
- Click Save.

Edit Notice of Sale

- Click Edit > **Edit the Notice of Sale**.
- Complete the outstanding details and click Save.

Create CoRD Consent

- Click Create Document > **Consent**
- Complete the details and click Save.

Note: If there is a mortgage registered on title, you will need to invite in the **Consentor** to complete the **Consent**. This is completed via the **Participants** screen.

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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.

Edit Lodgement Instructions, View and Sign all documents

- Click Edit > Lodgement Instructions > **Edit**
- Review and complete any outstanding details and click Save
- Click down arrow Sign > **Transmission, Notice of Sale, Consent > View**
- Click Sign > **Transmission > Sign**

Financial Settlement

- Navigate to the Settlement Screen
- Add Destination and Source line items as applicable

For Source Funds:

- Click > **Verify Funds**
- Click > **Authorise Funds** to authorise the Trust Account payment
- Click > **Sign** > **Financial Settlement Schedule.**

Monitor the Workspace

Check that:

- All documents are signed, and lodgement verification is successful
- Financial settlement is correct and balanced and signed.
- Review your Workspace and monitor any changes to the Workspace via the Workspace Summary screen.

Note: The Workspace must be in a **Ready** status for settlement to commence

For more information visit: community.pexa.com.au

