Taking over from your agent: what to ask for

A practical list of what the outgoing agent holds, and what to request.

A smooth handover protects residents from any gap in service and protects directors from surprises. Put the request in writing, name the date you need it by, and keep a copy of everything you receive.

Records and documents

- Leases, plans and any deeds of variation the agent holds.
- Service records, maintenance logs and warranties.
- Building and fire safety documents, including risk assessments and certificates.
- Insurance policies, schedules and claims history.
- Correspondence on open issues, complaints and disputes.

Money

- Service charge accounts for recent years and the current-year budget.
- A statement of money held for the building, including any reserve fund.
- Details of arrears and any payment plans in place.
- Outstanding invoices and committed works.

> **Service charge money.** Service charge money is generally held in trust for the leaseholders. Ask the outgoing agent to confirm in writing exactly where it is held and to transfer it to the building's new account.

Contracts and suppliers

ASK FOR	WHY IT MATTERS
Cleaning, maintenance and lift contracts	Renewal dates and notice periods decide when you can change supplier
Insurance renewal date	Cover must not lapse during the handover
Utility accounts and meter details	So supplies stay on and bills are not lost
Contractor contact details	To keep existing suppliers you are happy with

Keeping the service running

- Agree who residents contact about emergencies from the first day.
- Tell the contractors you intend to keep that nothing changes for them.

- Plan a short overlap period where you can, so questions can still be asked.

If the handover is slow

Chase in writing, and keep a log of requests and replies. If key records are not provided, take legal advice on the right way to ask again. Do not wait for the last day to find a gap.

Where we come in

Once you have the records, Leasehold Clarity gives you one place to keep them, so the next handover, if there ever is one, is a single export rather than a hunt.

General information, not advice on your circumstances. Leasehold law is detailed and changes: check the current position and take advice before acting. Leasehold Clarity is provided by Leasehold Clarity Limited (company no. 16963931), with management and professional services from Murphy Thompson Moore LLP (LLP No. OC314041).