Moving home planner & checklist

MANSELL McTAGGART

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Our guide to help you plan ahead and keep your move on track.



Your plans

- [ ] Think about what you need from your next home - location, size, type of property and must-haves.
- [ ] Consider your ideal timescale and whether you need to sell before you can buy.
- [ ] Work out a comfortable overall budget, including moving costs and any work the next property may need.
- [ ] If you are buying, speak to a mortgage advisor or lender about borrowing, affordability and an Agreement in Principle.
- [ ] Check whether your current mortgage can be transferred to a new property and whether early repayment charges apply.
- [ ] If you are considering renting, look into likely monthly rent, deposit, referencing requirements and availability.

Get quotes and explore options

- [ ] Mortgage advice - compare rates, fees, monthly payments and the options available to you.
- [ ] Solicitor or conveyancer - ask for a quote for your sale and/or purchase, and check what is included.
- [ ] Removals - consider getting two or three quotes; ask about packing, storage insurance and access.
- [ ] Survey - understand the different survey options and likely costs before committing to a purchase.
- [ ] Insurance - check buildings and contents cover, and when cover needs to begin.
- [ ] Storage or temporary accommodation - consider whether you may need either if dates do not line up.

Getting your home ready for sale

- [ ] Gather any gurantees, planning permissions, building regulation documents and certificates you hold.
- [ ] Locate boiler, electrical, gas and window paperwork, along with details of any recent work.
- [ ] If leasehold, find your lease and details of ground rent, service charges and managing agents.
- [ ] Think about small repairs, decluttering and presentation before photographs and viewings.
- [ ] Make a note of the features buyers are likely to value, along with useful information about the area.
- [ ] Consider how viewings can be accommodated and who will be available to provide access.

Once you have found a buyer or property

- [ ] Choose and formally instruct your solicitor or conveyancer.
- [ ] Complete the relevant property information forms and return paperwork promptly.
- [ ] If buying, confirm your mortgage application and arrange any valuation or survey.
- [ ] Respond to enquiries and requests for documents as quickly as possible.
- [ ] Keep your estate agent updated on your plans, timescales and any changes to your circumstances.
- [ ] If you are in a chain, keep in touch with your agent and solicitor about progress throughout.

Before exchange and completion

- [ ] Check that your solicitor has explained the contract, searches, enquiries and any outstanding points.
- [ ] Make sure your deposit and any balance of funds are ready when required.
- [ ] Confirm the proposed completion date with everyone in the chain before making firm arrangements.
- [ ] Book removals once the date is agreed; confirm access, parking, packing and insurance.
- [ ] Arrange buildings insurance from the date your solicitor advises is required.
- [ ] Organise post redirection and update important accounts and services with your new address.

Moving day and settling in

- [ ] Take final meter readings and photographs at your old and new properties.
- [ ] Check the property and agree any handover arrangements before leaving.
- [ ] Make sure you have all keys, alarm details, manuals and relevant paperwork.
- [ ] Arrange utilities, broadband, council tax and any services at your new address.
- [ ] Update your driving licence, vehicle logbook, bank, employer and any other important records.
- [ ] Once moved in, consider changing locks and checking smoke alarms and other safety features.

Useful contacts and quotes

- Mortgage advisor/lender:
- Solicitor/conveyancer:
- Removals company:
- Surveyor:
- Insurance provider
- Storage:
- Other:

Whether you are just starting to think about moving or are already making arrangements, your local Mansell McTaggart team is here to help.

We can talk through the process, help you understand the next steps and, where useful, point you towards options for mortgage advice, conveyancing, surveys and removals. There is no obligation to use any provider we mention - comparing quotes is always worthwhile.

If you are unsure what to organise first, speak to us and we can help you work through it.