

## Intelliworks Transfer of Equity

A dedicated workflow for efficient and well-managed transfer of equity transactions.



The Intelliworks Transfer of Equity workflow guides users through each step of the transaction using a best practice process developed in conjunction with expert conveyancers.

The Transfer of Equity workflow streamlines the process for transferring property from single to joint ownership or vice versa. Designed to ensure a smooth and efficient experience, the workflow supports a wide range of scenarios, *including*:

- Adding a new partner or family member to title deeds
- Removing someone's name from the title, e.g. on divorce or as part of a separation
- 'Buying out' a co-owner, and
- Gifting a share of property to a family member

Intelliworks Transfer of Equity Workflow offers a range of integrated benefits and features:

- **Legal specialisation** – The workflow ensures that conveyancers adhere to current law and best practice throughout the transfer of equity process. With built-in SDLT and LTT calculations, tailored client advice, dedicated correspondence, and up-to-date documents, clients receive accurate and compliance advice every time.
- **Risk management** – The built-in risk reviews help to identify red flags and manage potential risk factors such as conflicts of interest, client capacity issues, undue influence, insolvency, and more.

- **Operational efficiency** – Having a workflow specifically designed with SDLT submission and eDRS Land Registry integration saves time, avoids delays and removes the potential for errors.

### Key Features

- Dedicated workflow specifically for transfer of equity transactions
- Supports remortgages, new mortgage offers and transfers subject to an existing mortgage
- Integrated risk management to flag potential risks such as conflicts of interest, undue influence, and insolvency considerations
- Intuitive Transfer Clause Builder tool guides users step-by-step through drafting the Transfer Deed
- Easily assess and manage restrictions on transfer, including leasehold assignment requirements
- Digital submission of SDLT returns and registration with HM Land Registry

➤ Please get in touch to try our new Transfer of Equity Workflow, or [click here](#) to see a full breakdown of the new features available.



For more information please contact our sales team:

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