

# How to complete your source of funds submission

Please see below for details of the information you will need to have ready in order to complete your online source of funds capture.

This online tools allows you to quickly and easily upload all supporting documentation in one go to speed up the conveyancing process and avoid any delays to your property purchase.

You will be given clear instructions in each section to help you provide the correct and comprehensive details for the source of funds and easily upload multiple documents.

## From the sale of property

*We'll need the property's address, your Solicitor's details and bank statements showing the deposit of funds into your account up to today's date*

## From savings

*We'll need your account details and 6 months of statements from both the savings account and the account from which the savings were transferred.*

## From re-mortgage of other property

*We'll need the property's address and your mortgage lender's details.*

## From sale of investments

*We'll need your account details and documentation for the sale (proof or bill of sale & bank statement showing money has been received)*

## From a gift from a 3rd party

*We'll need your account details and the 3rd party's contact details, letter of gift, bank statement showing money has been received up to today's date.*

## From inheritance

*We'll need a letter from the Executor and a bank statement showing money received up to today's date.*

## From a loan from a 3rd party

*We'll need your account details and the 3rd party's contact details, letter of loan, bank statement showing money has been received up to today's date.*

## From other sources

*If none of the other sources apply, use this one. You can include a description of the source and upload all supporting documentation*

# How to complete your source of funds submission

To get started, your solicitor will send you a link to submit your source of funds documentation. Please click this.

This process is securely powered by Legl. You will be provided with Legl's Privacy Policy and Terms of Use to review ahead of submitting any information via the portal.

## 1. Getting Started

For optimal experience you should access this portal from your desktop computer or laptop. Before starting please ensure you:

1. Are using a modern internet browser - Chrome, Firefox or Edge work best
2. Have all supporting documents for your source of funds saved on your computer. Details of what you need to provide for each source outlined on page 1 of this document.

This process takes about 5-15 minutes depending on how many sources you are uploading. Your solicitor requires this information for regulatory purposes, so please be as detailed as possible and contact them if you have any questions.

**Please provide the following information**

Getting Started

Source of Funds ▼

During the course of the conveyancing process, it is a legal requirement that buyers provide adequate proof of the source of their funds to their Solicitor.

You can upload this information below. Please provide as much detail as possible. You can add as many sources as you like.

+ Add a source

## 2. Source of Funds

You will now be able to submit all information regarding your source of funds to your Solicitor.

Add as much information as you can to help your solicitor. To get started, click **+ Add Source**

You'll need to have the supporting documents saved on your computer, you can either upload from your saved documents or drag and drop into the web page.

Source of Funds ▼

During the course of the conveyancing process, it is a legal requirement that buyers provide adequate proof of the source of their funds to their Solicitor.

You can upload this information below. Please provide as much detail as possible. You can add as many sources as you like.

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**< Select a source to add**

<p><b>From the sale of property</b></p> <p><i>We'll need the property's address and your Solicitor's details</i></p>	<p><b>From savings</b></p> <p><i>We'll need your account details and 6 months of statements.</i></p>
<p><b>From re-mortgage of other property</b></p> <p><i>We'll need the property's address and your mortgage lender's details</i></p>	<p><b>From sale of investments</b></p> <p><i>We'll need your account details and documentation for the sale.</i></p>

Next you will be able to select each source that you will be providing.

Choose the first source of funds to upload the necessary supporting documentation and add the details requested in each section.

You can come back to this section to upload your documents and account details for each source until you have entered the total source of funds and saved all information in the corresponding sections.

# How to complete your source of funds submission

< Add source

**From savings**

If you are using money from more than one savings account, you must add each one separately.

Amount: £ 20000.00 ✓


Account number: 98383423423 ✓ Sort code: 44-04-44 ✓


Name of account: John's Savings account ✓

**Statement upload**

Please upload your last 6 months of statements from this account. This can be one or more files.

Upload File  
Drag & drop or click here to upload files

  
 copy.pdf

  
 copy.pdf

Supported files types: 'pdf', 'png', 'jpg', 'jpeg', 'gif', 'xls'

Cancel Save

When you select your relevant option you will be able to see an overview for each source. You will be guided through the details you need to enter and the documents you need to upload.

When you are uploading bank statements please ensure your details are clearly visible, so your solicitor can confirm the funds are held in your name.

Getting Started

**Source of Funds** ✓

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+ Add a source

**Total: £370,000.00**


<b>From the sale of property</b>	<b>£350,000.00</b>
Address: 1234 masdfinasf, asdfasd	<a href="#">remove</a> ✎
<b>From savings</b>	<b>£20,000.00</b>
Account: x2342	<a href="#">remove</a> ✎

Submit

Continue this process to complete all sources relevant to your purchase until you have accounted for the full price of the property.

Once you have submitted all relevant documents and source of funds details you will see your final overview and be able to click 'Submit'.

**Successfully submitted!**



*Savannah, everything needed has been submitted, and we have emailed you a confirmation.*

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You can now close this window, or return to Firm Name's Website via the button below.

Return to FirmName.com

Please hit submit and you will be notified that the process has been completed successfully.

Your solicitor will receive a report, and will be in touch to discuss next steps.