Residential Logbook Association

Buying and Selling Residential Property:

Digital Sales Packs

Non-Statutory Guidance for Property Professionals

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1. About this guidance

This non-statutory guidance is issued by the Residential Logbook Association (RLBA) to support the comprehensive integration of the Government's Home Buying and Selling Reform Roadmap for residential property (the Roadmap). It sets out how Verified Digital Sales Packs are produced, who can rely on them, and how they support Material Information obligations. It applies to residential property in England and Wales and should be read alongside the RLBA's Digital Property Logbooks guidance and the Government's non-statutory guidance on Material Information.

The Roadmap commits the Government to legislating to require a sales pack to be prepared before a property is listed, and to making Digital Sales Packs a standard feature of all property transactions. Property Professionals are strongly encouraged by Government to adopt them now, ahead of legislation.

While this guidance does not carry legislative force, compliance is strongly recommended. Adherence ensures market transparency, mitigates consumer risk, satisfies modern due diligence benchmarks, dramatically reduces transaction friction, and demonstrates to regulators compliance with the Government's Roadmap.

2. Definitions and Interpretation

This guidance is written for **Property Professionals**, as described in the RLBA's Digital Property Logbooks guidance. Terms defined in that guidance have the same meaning here. In addition:

Material Information - Information which traders (including estate agents) are required to provide to consumers under the Digital Markets, Competition and Consumers Act 2024 (DMCC Act 2024), as described in the Government's non-statutory guidance on Material Information (including any updated guidance issued by Government) and the categories identified in Chapter 12 of the Roadmap.

Conveyancing Grade - Documents and data obtained from the same official and regulated sources, in the same form, as would be used by a conveyancer as part of the conveyancing process under the Law Society Conveyancing Protocol: for example, title documents from HM

Land Registry (HMLR), Law Society property information forms (TA6, TA7 and TA10) completed and signed by the seller, and searches from official and regulated search providers.

Verified Sales Pack - A Digital Sales Pack produced by a Verified Sales Pack Provider from Conveyancing Grade sources, carrying the RLBA Watermark and registered on the National Logbook Register (NLR).

Contract Bundle - The bundle of documents issued by the seller's conveyancer to the buyer's conveyancer under the Law Society Conveyancing Protocol (Step 13 of the draft updated Protocol), comprising the draft contract together with the title documents, searches, property information forms (TA6, TA7 and TA10) and other supporting documents. Where this bundle is prepared before an offer is accepted, this guidance refers to it as a Sales Pack: the content includes that of a Contract Bundle, with the exception of the contract.

Verified Sales Pack Provider - Either (a) an RLBA Registered Provider authorised by the RLBA to produce Verified Sales Packs; or (b) a law firm regulated by the Solicitors Regulation Authority or the Council for Licensed Conveyancers (a **Regulated Law Firm**). Verified Sales Packs can be commissioned by estate agents, sellers or conveyancers from either.

RLBA Regulation - The RLBA regulates RLBA Registered Providers of Verified Logbooks and of Verified Sales Packs, and maintains a published list of them showing the services each is authorised to provide. An RLBA Registered Provider of Verified Logbooks may also be authorised to deliver Verified Sales Packs, but a provider authorised only for Verified Sales Packs may not provide Verified Logbooks. Regulated Law Firms remain regulated by their own professional regulator.

Enhanced Material Information - Conveyancing and lender grade Material Information, which a Verified Sales Pack aligned to Government's Non Statutory Material Information Guidance. It is an enhanced level of Material Information which is obtained from the same sources currently used by conveyancers to comply with the Law Society's Protocol and which can accordingly be relied upon for lender decisioning from the point the property is on the market (see section 4).

RLBA Watermark - The standard cover sheet attached to every Verified Sales Pack, confirming the property, the date produced, the pack tier, the format (PDF and/or structured data), the data sources used, the provider and its NLR registration.

Verified Sales Pack Tiers

Tier	Contents	Primary use
1. **Material Information**	Material Information, and Enhanced Material Information aligned to Government's Non Statutory Guidance (see section 4)	Listing the property; Material Information compliance.
2. **Digital Sale Ready**	Tier 1, plus HMLR title register and plan, lease (where applicable), signed TA6, TA7 and TA10, and supporting documents such as planning consents and guarantees. EPC link where available.	Issuing the Contract Bundle; reliance by conveyancers.

Tier	Contents	Primary use
3. **Digital Sale Ready Plus**	Tier 2, plus local authority, drainage and water, environmental and locality searches.	Full upfront pack in line with Annex B of the Roadmap; reliance by conveyancers and lenders.

Note: A property condition report may be added voluntarily to any tier where obtained.

Seller identity: Verified Sales Packs do not include **Seller identity verification,** which should have been obtained by the agent or conveyancer as part of their onboarding process and so should not be duplicated. Nor should a Seller's ID be disclosed as part of a pack to a prospective purchaser

3. Benefits of a Verified Sales Pack

Conveyancing Grade

Because a Verified Sales Pack contains Conveyancing Grade documents and data, it can be used and relied upon by conveyancers in the same way as documents they have obtained themselves under the Law Society Conveyancing Protocol. As these are the same sources relied upon in reporting to lenders under the UK Finance Mortgage Lenders' Handbook, a Verified Sales Pack can equally be relied upon for lending purposes.

Enhanced Material Information

A Verified Sales Pack will also provide Enhanced Material Information (see section 4). This is of a higher grade than seller declared information, and will bring the following benefits:

- **Verified, not declared:** Matters which sellers commonly do not know or misunderstand, such as restrictions, covenants, rights of way, planning history and flood risk, are evidenced from title documents, searches and official records rather than relying on a seller questionnaire.
- **Lender decisioning from listing:** Enhanced Material Information will be conveyancing and lender grade, so it can be relied upon to support decisions from the point the property is on the market, including mortgage lending decisions, rather than only after an offer has been accepted.
- **Evidence of compliance:** A Verified Sales Pack provides a strong indicator to regulators, including Trading Standards and the Competition and Markets Authority (CMA), that the trader has made reasonable endeavors to meet its Material Information obligations under the DMCC Act 2024.
- **Reduced burden on traders:** Material Information is gathered and presented from trusted sources such as HMLR, reducing the need for estate agents to source and interpret it themselves. However agents should be mindful of their duties as Traders under the DMCC Act 2024 to check the information is correct and include any additional Material Information they deem would be required for a purchaser to make an informed purchase decision.

4. Verified Sales Packs and Material Information

Estate agents are not required to use a Verified Sales Pack to comply with their Material Information obligations, and may gather Material Information themselves from the sources specified in the Government's non-statutory guidance on Material Information.

However a Verified Sales Pack will be a route to obtain conveyancing and lender grade Material Information. This Enhanced Material Information is an enhanced level of Material Information which can be relied upon for lender decisioning at the point the property is on the market, rather than only once an offer has been accepted.

Traders remain responsible for their listings.

5. Guidance for Professionals Representing the Seller

Initial Checks and the National Logbook Register

Upon accepting instructions, the estate agent and/or the conveyancer should consult the NLR. Where a Verified Sales Pack is shown, it should be obtained from the RLBA Registered Provider named on the NLR, with the seller's authority.

Sales Packs produced by lawyers

Sales Packs are not only produced by RLBA Registered Providers. A Regulated Law Firm acting for the seller can also produce a Sales Pack, including as a Verified Sales Pack (see the definition of Verified Sales Pack Provider).

A Sales Pack prepared by a Regulated Law Firm can be relied upon by the buyer's conveyancer whether or not it is registered on the NLR (see section 6). However, where it is produced as a Verified Sales Pack, carrying the RLBA Watermark and registered on the NLR, it can also be found by other professionals and carried into the property's Logbook.

Commissioning a Verified Sales Pack

- **Commissioning:** Where no Verified Sales Pack exists, the estate agent or conveyancer should commission one from a Verified Sales Pack Provider (or the seller's conveyancer may produce one itself) at the point of instruction, with the seller's authority and at the tier appropriate to the transaction.
- **Verification:** The seller completes and signs the TA forms through the provider, and they cannot be amended once signed. The provider obtains all other documents and data from source, applies the RLBA Watermark and registers the pack on the NLR.
- **Marketing:** The estate agent should use the Material Information in the pack (and, once available, Enhanced Material Information) in the property listing from the outset of marketing.
- **Currency:** The provider should refresh the pack from source if marketing is prolonged beyond 6 months or circumstances materially change.
- **Verified Logbook:** Professionals can recommend that the pack is delivered through a Verified Logbook, preserving it for the buyer and all future transactions particularly if the Property is a Complex Home (as defined in the RLBA's Digital Property Logbooks guidance).

6. Guidance for Professionals Representing the Buyer and Lenders

- **Requesting the Pack:** Once an offer is accepted (or earlier, where a Sales Pack has been prepared before an offer), the buyer's conveyancer should request the Sales Pack or Contract Bundle from the seller's conveyancer and, for a Verified Sales Pack, check the RLBA Watermark.
- **Reliance:** Where the buyer's conveyancer receives a Sales Pack or Contract Bundle produced by another Regulated Law Firm, or a Verified Sales Pack produced by an RLBA Registered Provider, it can use and rely upon the Conveyancing Grade documents and data in it without having to repeat the exercise of obtaining them, unless they are out of date or professional judgement requires otherwise.
- **Lenders:** The buyer's conveyancer can report to the lender on the basis of the pack. Once the Government's updated Material Information guidance is issued, lenders will also be able to rely on Enhanced Material Information to support lending decisions from the point the property is on the market.
- **Boundary of Professional Liability:** A Verified Sales Pack replaces the gathering of documents and data, not the conveyancer's advice. Enquiries, title investigation and reporting to the client and lender continue in the usual way. Its assurances are limited to the Conveyancing Grade sources utilised, not the accuracy of the data provided.
- **Completion:** On completion, the pack documents should be uploaded to the property's Logbook under section 5 of the RLBA's Digital Property Logbooks guidance.

A Verified Sales Pack ensures that the information needed to market, sell, buy and lend on a property is gathered once, from trusted sources.