

# Experience Portfolio

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The purpose of applicants providing this portfolio is to verify the applicants experience and understanding of conveyancing practice including client care and legislative requirements, and to demonstrate that the applicant meets the required competencies to an equivalent standard required of the Diploma of Conveyancing.

The Diploma of Conveyancing is weighted heavily on analysing the title, plan and the instruments registered on the record of title in order for the conveyancer to provide clients with information about the property along with their rights and obligations as owner. Other learning outcomes of the Diploma of Conveyancing includes ensuring that purchasers are provided with pre-unconditional advice (e.g. compliance with the Building Code) along with ensuring that mortgagee requirements are met in terms of disclosure of the main obligations meaning and effect of the mortgage.

The NZ Society of Conveyancers Registration Authority requires;

- All applicants seeking to **Practice on Own Account** are to **complete Sections One and Section Two**.
- Applicants who are seeking to be registered as a conveyancer by way of **Equivalency Assessment** and intending to remain as an employee of a conveyancing firm or law firm are to complete **Section One** only.

## Section One

### To be completed by;

- Applicants seeking to **Practice on Own Account**.
- Applicants seeking to be registered by way of **Equivalency Assessment** and intending to remain as an employee of a conveyancing or law firm.

The Registrations Authority assessment is based on the quality of the written advice that you provide to your client in respect of reporting on the title/plan and its instruments, pre-unconditional recommendations that you make to your client, reporting on the LIM report, obligations of a mortgage and guarantee (if applicable).

For each of the **4** samples below, select a transaction that you have attended on during the period in which experience is claimed. Certain documents may need to be redacted.

**Documents must be labelled and ordered in the sequence as outlined in the table below.**

<p><b>Sample 1</b> – Purchase of a property with existing dwelling (commences as a conditional contract, fee simple record of title) with a mortgage and Kiwisaver withdrawal. Please select a transaction where the record of title at least 3 different instruments to report on.</p>		
<b>Attachment is to be labelled as</b>		
<p><b>Sample 1 – advice</b> Includes correspondence, information and <u>advice that you have provided to your client</u> during the steps of the selected transaction, including advice on satisfying conditions and disclosure of mortgage &amp; loan. <b>(maximum of 10 pages)</b></p>	<p><b>Sample 1 – evidence</b> Includes documents/correspondence (i.e. statement of account) that <u>you have produced/received</u> during the transaction which verify that you have been the author, addressee or witness during the steps of this transaction and Kiwisaver withdrawal. <b>(maximum of 20 pages)</b></p>	<p><b>Sample 1 – docs (provide relevant pages only)</b></p> <ul style="list-style-type: none"> <li>- Title (after settlement)</li> <li>- Plan</li> <li>- Title instruments (3)</li> <li>- Agreement for sale and purchase</li> <li>- Loan agreement</li> <li>- Bank mortgage instructions</li> <li>- A&amp;I</li> </ul> <p><b>(maximum of 50 pages)</b></p>

**Sample 2** – Purchase of a unit title property with mortgage (commences as a conditional contract).

**Attachment is to be labelled as**

**Sample 2 – advice**

Includes correspondence, information and advice that you have provided to your client during the steps of the selected transaction including advice on satisfying conditions and disclosure of mortgage and loan, and body corporate. **(maximum of 10 pages)**

**Sample 2 – evidence**

Includes documents/correspondence that you have produced/received during the transaction which verify that you have been the author, addressee or witness during the steps of this transaction **(maximum of 20 pages)**

**Sample 2 – docs (provide relevant pages only)**

- Title (after settlement)
  - Plan
  - Title instruments (if applicable)
  - Agreement for sale and purchase
  - Bank instructions
  - Loan agreement
  - A&I
- (maximum of 50 pages)**

**Sample 3** – Purchase of a property with mortgage and bank guarantee for a Company or Trust. Please select a transaction where the record of title has several instruments to report on (commences as a conditional contract)

**Attachment is to be labelled as**

**Sample 3 – advice**

Includes correspondence, information and advice that you have provided to your client during the steps of the selected transaction, including advice on satisfying conditions and disclosure of mortgage, loan and guarantee. **(maximum of 10 pages)**

**Sample 3 – evidence**

Includes documents/correspondence that you have produced/received during the transaction which verify that you have been the author, addressee or witness during the steps of this transaction (e.g. Resolutions) **(maximum of 20 pages)**

**Sample 3 – docs (provide relevant pages only)**

- Title (after settlement)
  - Plan
  - Title instruments (minimum of 2)
  - Agreement for sale and purchase
  - Guarantee document
  - Bank instructions.
  - A&I
- (maximum of 50 pages)**

**Sample 4** – Sale of a property with either;

- a) tenancy remaining and rental apportionments required at settlement, or
- b) unit title with body corporate levy apportionments required at settlement.

**Attachment is to be labelled as**

**Sample 4 – advice**

Includes correspondence, information and advice that you have provided to your client during the steps of the selected transaction. **(maximum of 5 pages)**

**Sample 4 – evidence**

Includes documents/correspondence that you have produced/received during the transaction which verify that you have been the author, addressee or witness during the steps of this transaction and tenancy. **(maximum of 20 pages)**

**Sample 4 – docs (provide relevant pages only)**

- Title
  - Agreement for sale and purchase
  - Settlement statement
  - Bank discharge of mortgage (if applicable).
  - A&I
- (maximum of 50 pages)**

**Samples files are to be scanned into PDF Format and *emailed* to the Society.**

**Each Sample file is to be named as indicated above i.e. Sample 1 – advice, Sample 4 – evidence.**

**Please ensure that the maximum number of pages per sample is observed.**

## **Section Two**

*A selection of correspondence and advice that you have provided to your client during the period for which practical experience is claimed. The Registration Authority is looking for samples of work whereby the applicant is the author, witness or addressee.*

### **To be completed by;**

- Applicants seeking to **Practice on Own Account**

Please supply a complete redacted copy of the **letter/email advice that you provide your client** in respect of all the following scenarios. You **may** provide supporting documentation labelled as **Sample 5.# - docs** if needed to demonstrate/clarify the advice that you are providing to your client

**5.1** Purchase of a land and house package subject to issue of title.

Label as **Sample 5.1- advice** (maximum 10 pages) and **Sample 5.1 – docs**

**5.2** Purchase of cross lease property

Label as **Sample 5.2- advice** (maximum 10 pages) and **Sample 5.2 – docs**

**5.3** Purchase of property subject to right of way and other easements

Label as **Sample 5.3- advice** (maximum 10 pages) and **Sample 5.3 – docs**

**5.4** Purchase of property subject to land covenants

Label as **Sample 5.4- advice** (maximum 10 pages) and **Sample 5.4 – docs**

**5.5** Purchase of property with a Limited as to Parcels title

Label as **Sample 5.5- advice** (maximum 10 pages) and **Sample 5.5 – docs**

**5.6** Purchase of a property where you have requisitioned the LIM report

Label as **Sample 5.6- advice** (maximum 10 pages) and **Sample 5.6 – docs**

**5.7** Purchase of a property where you have requisitioned the title

Label as **Sample 5.7 - advice** (maximum 10 pages) and **Sample 5.7 – docs**

**5.8** Purchase of a property which is subject to:

S72 Building Act 2004/S36 Building Act 1991; OR

S27B State Owned Enterprises Act (Resumption of land – Waitangi Tribunal)

Label as **Sample 5.8- advice** (maximum 10 pages) and **Sample 5.8 – docs**

**5.9** An example where you have solved a settlement dispute i.e. a request for retention of funds on settlement, that required correspondence between the other party's conveyancing professional to resolve a matter

Label as **Sample 5.- 9 advice** (maximum 10 pages) and **Sample 5.9 – docs**

**5.10** Copy of a settlement statement and GST invoice that you have prepared for a GST/Zero Rated transaction

Label as **Sample 5.- 10 advice** (maximum 10 pages) and **Sample 5.10 – docs**

***Samples files are to be scanned into PDF Format and emailed to the Society. Each Sample file is to be named as indicated above***