Terms of Service for Conveyd Ltd

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1. Who we are

1.1 Conveyd. Conveyd Ltd ("Conveyd", "we", "us" or "our") is a technology company. We operate in two ways:

- as a facilitator, we help homeowners collect and share their personal and property information with a Legal Partner
- as a provider of workflow technology to Legal Partners

We are not a law firm and we do not provide Legal Services. We are not regulated by the Council for Licensed Conveyancers (CLC), the Solicitors Regulation Authority (SRA), the Financial Conduct Authority (FCA) or any other professional regulator.

1.2 Our Legal Partners. Your conveyancing is carried out by a law firm, which we call a Legal Partner. We work with two:

- **Conveyd Legal Ltd ("Conveyd Legal")**, a conveyancing firm licensed and regulated by the CLC. Conveyd Legal is a separate company from Conveyd, however it is wholly owned by Conveyd Ltd
- **HB Property Legal Ltd, trading as JP Goldman ("JP Goldman")**, a conveyancing firm licensed and regulated by the CLC. JP Goldman is an independent firm. Conveyd does not own or have any vested interest in it

Each firm's company number, licence number and address are in its client care letter.

1.3 What that means for you. You instruct your Legal Partner directly. Your Legal Partner gives you legal advice. We provide the platform your case runs on. We are not a party to your agreement with your Legal Partner.

2. Definitions

- **"Platform"** means the Information Collection Service and the Workflow Platform together
- **"Information Collection Service"** means the technology that lets homeowners collect and share their personal and property information
- **"Workflow Platform"** means the technology we provide to Legal Partners
- **"Conveyd Services"** means the Information Collection Service and the Workflow Platform
- **"User"** or **"you"** means any homeowner using the Information Collection Service
- **"Legal Partner"** means Conveyd Legal, JP Goldman, or any other law firm regulated by a professional regulator such as the CLC or SRA that we work with

- **"Law Firm Client"** means someone who has a direct agreement (a retainer) with a Legal Partner for Legal Services
- **"Legal Services"** means services ordinarily provided by a legal professional, such as a solicitor or licensed conveyancer. This includes giving legal advice, preparing legal documents, and reserved legal activities under the Legal Services Act 2007, such as drafting contracts and transfers
- **"Legal Service Fees"** means fees charged by a Legal Partner for Legal Services
- **"Service Providers"** means outside organisations engaged by us or a Legal Partner to supply services, such as search providers and identity check providers
- **"Payments"** means money paid through the Platform, which can include Legal Service Fees, platform fees and costs of Service Providers
- **"Personal Data"** has the meaning given in the UK GDPR and the Data Protection Act 2018
- **"Confidential Information"** means information that is confidential and is either labelled as confidential or clearly is

3. Agreement

These Terms govern your use of the Conveyd Services. By making a Payment through the Platform, or by submitting Personal Data through the Platform for a property transaction, you agree to these Terms. If you do not agree, please do not use the Conveyd Services.

4. How the service works

4.1 What we do. You use the Platform to:

- collect your personal and property information, including documents such as identity documents (checked through a third party), bank statements and mortgage offers
- share that information with your Legal Partner, with your permission
- follow the progress of your transaction

We keep a digital record of what you share to help with your transaction and any future ones.

4.2 Which Legal Partner acts for you. We choose which Legal Partner acts for you. In some cases we may route your case to JP Goldman instead of Conveyd Legal. Our reasons can change over time and can include your lender, capacity and other factors. We will tell you which firm will act for you before you proceed, and your client care letter will confirm it. If something changes during your case, such as your lender, the firm acting for you may change. We will gain your consent and tell you if that needs to happen.

4.3 Your choice of legal provider. You are free to use any legal provider you like. If you want to use the Conveyd Services, you agree to use the Legal Partner we have chosen for you. If you would rather use a different provider, our service will not be right for you. Please seek legal services directly and do not submit your information.

4.4 Legal Services. Legal Services are provided only by your Legal Partner.

- You enter into a direct agreement with your Legal Partner. That makes you a Law Firm Client
- Conveyd Ltd is not a party to that agreement and does not provide Legal Services
- Your Legal Partner is independent and makes its own professional decisions. Conveyd Ltd does not direct them

4.5 Conveyd Legal. Conveyd Legal is owned by Conveyd, which means Conveyd benefits financially from Conveyd Legal's work. Conveyd Legal is a separate company and regulated by the CLC. It must meet its own regulatory duties, including acting in your best interests and keeping its professional independence. Conveyd Legal's staff use the Platform to work on your case.

4.6 JP Goldman. JP Goldman is an independent firm. It has a commercial arrangement with Conveyd, which includes sharing fees (see clause 4.7). JP Goldman's staff use the Platform to work on your case. JP Goldman is responsible for the Legal Services it provides, for any client money it holds, and for its own complaints procedure and professional indemnity insurance.

4.7 Referrals and fees.

- Some mortgage brokers and estate agents recommend Conveyd to their clients. We may pay them a referral fee for introductions. Their recommendation is not advice from us, and it is your decision whether to use Conveyd
- Conveyd has financial arrangements with each Legal Partner. For JP Goldman this fee is listed explicitly as the “Platform Fee”. Fee sharing does not affect the independence or quality of the Legal Services you receive
- We do not give mortgage advice or introduce you to brokers or lenders. We are not regulated by the FCA
- The amount of any referral fee or fee share for your case depends on the details of your case and who referred you. It will be detailed in your client care letter.

4.8 Quality and the Legal Ombudsman. We monitor service levels. You may have the right to refer a complaint about Legal Services to the Legal Ombudsman, as set out in your Legal Partner's client care letter. That right does not extend to the Conveyd Services.

4.9 Before you proceed. By continuing, you confirm that:

- you understand you are free to choose your legal provider
- you have chosen to use the Conveyd Services and the Legal Partner we have chosen for you
- you accept how our service works, as set out in these Terms

5. Your information

How we and your Legal Partner collect, use, store, share and keep your information is set out in our Privacy Policy. This includes who is responsible for your information at each stage, how we use AI, where your information is held, and who we share it with. Please read it.

In short:

- Your Legal Partner is responsible for the information in your case. We host it on the Platform and handle it on your Legal Partner's instructions
- We also use information from cases to monitor and improve the Platform, including developing our tools. For that purpose only, we are responsible for it ourselves
- We use third parties, such as identity check providers and our e-signature provider, to deliver the service. You may need to complete steps directly with them. Their own terms and privacy policies apply to what you share with them, and we are not responsible for the services they provide directly
- We keep your information secure. If there is a security incident affecting it, we will tell you as the law requires
- Each Legal Partner explains how it uses your information in its client care letter and privacy information. Please read that too

We collect technical data about your device and how you use the Platform to provide updates, support and improvements. The Privacy Policy explains this.

6. Fees and payments

6.1 Payments. You may be sent a secure link to pay towards your property transaction. This can be through the Platform or in messages sent in connection with your Legal Partner's work.

Conveyd only collects payments for disbursements owed to Service Providers, such as search fees and identity checks. We do not collect Legal Service Fees. These are paid directly to your Legal Partner, in line with its client account and terms. Money we collect goes either to the Service Provider or to your Legal Partner to pay on your behalf.

Once a Payment has been processed, it usually cannot be cancelled, refunded or recovered through Conveyd. This does not affect your statutory rights. For a refund or cancellation of a payment collected through the Platform or sent directly to Conveyd Legal, contact support@conveyd.co.uk. For a payment made to JP Goldman, contact details will be available in your client care letter.

By making a Payment, you confirm that the money does not break any law, including anti-money laundering and financial crime laws. We can refuse or cancel a Payment, suspend your access without notice, and report to the police or other authorities, if we reasonably suspect fraud, unlawful activity or a breach of these Terms. We are not liable for any loss that results.

6.2 Pricing. If you are not using a Free Legals arrangement, you will see an itemised total price when you get your quote. It includes Legal Services, any platform fees, and third-party costs and disbursements. As your transaction goes on, new information may mean extra costs. We or your Legal Partner will tell you before any extra cost is incurred. Extra costs are paid to your Legal Partner at completion.

6.3 Disbursements. Disbursements are third-party costs, such as search fees, Land Registry fees, identity check fees and bank transfer fees. We will tell you about them upfront where we can.

6.4 What you pay and when.

Purchases. We may collect an upfront fee for search fees, identity checks and other disbursements. We will show you this on the Platform. Legal Service Fees and completion payments are paid directly to your Legal Partner.

Remortgages. No upfront payment is taken unless your lender asks for searches or non-standard work. We will tell you in advance if so. Completion payments are paid directly to your Legal Partner.

Free Legals with a partnered lender. If you use Conveyd under a Free/Assisted Legals arrangement:

- you won't get a separate legal fee quote, because your lender covers the standard fee (including legals and disbursements) under its offer
- anything outside your lender's Free Legals scope, such as items on its exclusions list, is paid by you directly to your Legal Partner
- Conveyd does not handle or hold any money for extra or excluded items
- all extra costs are set out in your completion statement and are communicated to you at the time of the cost being incurred

6.5 Client money. Conveyd Ltd does not operate a client account and does not hold client money. Payments you make to Conveyd Ltd are reimbursement of costs we incur on your behalf, or payment for our services. They are not held on trust or in a client account, and may be held with our general business funds. Your Legal Partner holds client money separately, under its own regulatory obligations. Conveyd Legal uses Griffin Bank Ltd for its client account and does hold client money segregated for your individual case.

7. How Legal Partners use the Platform

Legal Partners are solely responsible for the Legal Services they give and for complying with their regulatory duties, including professional insurance and codes of conduct.

The Platform is a set of workflow and data tools. It helps with the administrative and process side of your transaction. It is not legal advice and does not replace your Legal Partner's judgement. We do not give legal opinions and we do not interfere with or direct your Legal Partner's professional judgement.

The Platform uses AI tools to help your Legal Partner. Our Privacy Policy explains how.

Use of the Platform does not reduce your Legal Partner's duty of care to you, its professional independence or its regulatory obligations.

8. Platform availability

We work to keep the Platform available. We will tell you in advance about planned maintenance. Technical support is available for Platform issues.

9. Limitation of liability

Conveyd Ltd:

- provides technology only and is not responsible for Legal Services
- is not regulated by the CLC, SRA, FCA or any other professional body, and does not provide reserved legal activities under the Legal Services Act 2007
- does not hold professional indemnity insurance for Legal Services. Each Legal Partner holds its own. We hold appropriate insurance for our technology services
- limits its liability as far as the law allows. Nothing in these Terms limits liability that cannot be limited by law

10. Confidentiality

We may have access to confidential information about you, your property and your Legal Services. We will keep it confidential and will not share it with anyone outside your matter, except:

- with our employees, contractors, Legal Partners and Service Providers who need it to provide you with services
- where the law requires it
- where we need to meet a professional or regulatory duty

We will only use Confidential Information to provide, operate and improve the Platform, as described in these Terms and our Privacy Policy. We will not use it for our own separate commercial benefit or for anyone else's. We do not sell your information.

Confidential Information does not include information that:

- is or becomes public
- we already knew lawfully
- we develop independently without using your Confidential Information
- we lawfully get from a third party, Legal Partner or Service Provider who is free to share it

We are not responsible for loss, destruction, change or disclosure of Confidential Information caused by a third party. We can use information on an aggregated or anonymous basis to monitor and improve the Platform, develop our services and technology, and create statistics or benchmarks.

11. Changes to these Terms

We can change these Terms. We will tell you about significant changes. When terms change the next time you login to the platform you will be asked to accept them to continue. If you keep using the Conveyd Services after a change, you accept it. Changes will not affect an existing transaction without notice to you.

12. Complaints

Complaints can be about the Platform (Conveyd) or about Legal Services (your Legal Partner). We keep them separate so you always know where to go.

12.1 Platform or service issues (Conveyd). This covers technical issues, onboarding problems, document upload or signing problems, status visibility and starting an identity check. It does not cover the services of the identity check provider.

1. Email complaints@conveyd.co.uk
2. We will acknowledge your complaint within 2 working days
3. We aim to resolve it within 10 working days
4. If you are not satisfied, you can escalate it to our senior management team

For complaints about how your information is used, see our Privacy Policy.

12.2 Legal Services issues (your Legal Partner). This covers legal advice and decisions, meeting lender conditions, client money, registration at Land Registry or Companies House, and anything else needing a solicitor's or conveyancer's professional judgement.

1. Complain directly to your Legal Partner using its complaints procedure. Details are in your client care letter, and you can see them on the Platform
2. Your Legal Partner is regulated by the CLC. It will handle your complaint in line with CLC requirements and the rules of the Legal Ombudsman

12.3 Mixed issues. If a complaint involves more than one party, for example a Platform error that affects a legal case, we will act as your first point of contact, help you work out who should respond, and give you any records or logs that help.

12.4 Your rights. Your statutory rights and your right to complain to regulators are not affected. Conveyd is not regulated by the CLC, SRA or any other legal regulator. This means you cannot complain to those bodies or the Legal Ombudsman about our service. You may be able to complain to the Legal Ombudsman about your Legal Partner's services, as set out in its client care letter.

13. Governing law

These Terms are governed by the laws of England and Wales.

14. Contact

For Platform questions, and any questions about your information, contact privacy@conveyd.co.uk.

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