McCARTHY STONE
Life, well lived

Job Description

Property Transfer Assistant

Department	Reports To	Work Location
Central Sales	Property Transfer Team Leader	Bournemouth

Purpose

To ensure the smooth administration and management of customer records, legal documentation, and property-related processes, supporting customers, families, and stakeholders throughout their journey.

This role focuses on maintaining compliance, accuracy, and efficiency in property transfers, resales, permissions, and customer data management while upholding company standards and providing excellent service. Additionally, it requires collaboration across departments, due diligence in all responsibilities, and acting as a professional ambassador for the business.

Key Responsibilities

Summary of key accountabilities across the three Property Transfer teams:

- Production of management information packs
- Assisting with the smooth journey of resales, following the acceptance of an offer
- Accurate completion of legal documentation
- Administration of any change to our customer's personal information or circumstances
- Supporting families following the death of a customer
- Ownership of updating our customer data, maintaining accurate customer records across our portfolio
- Administration of all apartment alterations and communal change requests, ensuring full compliance with company policy
- Administration of all requests from customers for permission to have a pet, ensuring full compliance with company policy
- Provide support to all applications for a residents' associations, ensuring they meet all industry guidelines
- Administration of any notification to sublet and providing guidance to our customers
- Supporting the occupier approval process for all new customers to our communities
- Production of Residency Agreements for our Retirement Living Plus developments

- Administration of the transfer of all properties and car parking spaces; this includes core sales, rentals, resales, intercompany and sublets
- Ownership of the accuracy of development and apartment information on our main database
- To carry out all associated tasks in a timely manner to ensure the continuous smooth running of the department
- Investigate and respond to all customer and solicitor enquiries relating to the key responsibilities of the department
- Ability to carry out required due diligence across all responsibilities and fully comply with McCarthy Stone's policies and procedures
- The ability to forge relationships and collaboration within the department, as well as the wider business
- Effective collaboration with the wider business to collate information requested by our customer
- Maintain standards and consistency by keeping up to date and operating within the latest defined standard specifications, using the approved documentation, process, systems and source information to ensure consistent and effective performance
- To have an awareness of legislation affecting the provision of and compliance with property transfers, subletting and permissions including but not limited to data protection, equality and compliance
- To act as an ambassador for MCS, promoting the core values and philosophy of the business, behaving in a professional and courteous manner at all times
- Undertake such other reasonable duties, commensurate with the job holder's experience and qualifications as may be required for the smooth running of the business
- Being fully accountable to your line manger
- To take personal responsibility for your continued learning and development

Key Performance Measures

Example of generic KPIs relevant for the position

- Expectation to contribute to the improvement of operations and processes
- Behave in a kind and mindful manner with our customers and colleagues
- Respond to all enquiries and tasks in an accurate and timely manner
- Effectively follow all processes, guides and directives
- Effectively maintaining caseload trackers and workflow
- Competency in the use of Microsoft Excel, Word, Teams and Outlook

Key Stakeholders

Summary of relevant internal and external stakeholders of the position and required expertise to manage stakeholders effectively.

- Solicitors
- Customers and their families/representatives
- Our YMS business

- Our Central Sales business
- Our Rentals business
- Our Legal Team
- The Wider MCS Group

Knowledge & Experience

Any required relevant experience, formal qualifications, specific knowledge, relationships or expertise etc.

- GSCE Maths and English at Grade C or above (or equivalent)
- Sound Microsoft Office and database administration skills.
- Demonstration of a positive, kind and energetic attitude
- Always acting professionally with integrity, thriving through challenge and opportunity.
- A keen sense of intrigue and curiosity to investigate varying queries
- A proven track record in following processes and guidelines
- Ability to learn new tasks quickly and efficiently.
- Strength in working under pressure and keeping on task, whilst being flexible and agile to change.
- Strong time management and planning skills
- Previous experience of working in administrative and customer focused roles
- Experience in block and property management would be advantageous
- Knowledge of leases and transfer documents would be advantageous

Skills:

Skills Required (change proficiency as required and add rows if needed)	**Proficiency Level Required (select drop down)**
Computer literate	Practitioner (has detailed knowledge and significant experience in this area)
Ability to meet strict deadlines	Practitioner (has detailed knowledge and significant experience in this area)
Ability to manage a busy workload	Practitioner (has detailed knowledge and significant experience in this area)
Communication skills, written and oral	Practitioner (has detailed knowledge and significant experience in this area)
Working knowledge of the sale and purchase process for leasehold properties	Working (has working knowledge and practical experience in this area)

Communicating collaboratively, managing internal and external stakeholders, establishing, and maintaining positive relationships.	Working (has working knowledge and practical experience in this area)
Time Management and planning skills	Practitioner (has detailed knowledge and significant experience in this area)

Health and Safety:

As Line Manager your Health and Safety responsibilities in relation to you and staff under your control are to:

- Take reasonable care of your/ their own health and safety and that of any person who may be affected by your/ their acts or omissions at work.
- Act in accordance with Company Health and Safety policies and procedures, are trained and competent to carry out work properly and do so,
- Are familiar with, understand and discharge any allocated safety responsibilities,
- Are provided with adequate information, supervision and equipment to allow duties to be undertaken in a safe manner and
- Immediately stop any unsafe activity until adequate measures have been taken to remove the risk or reduce it to as low as possible, seeking advice from H&S qualified staff as appropriate.
- Have knowledge of who the Frist Aiders and Fire Wardens are