

# Terms & Conditions

*Professional onboarding terms for LetSavvy Ltd*

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Please read these Terms & Conditions carefully before completing the Investor Onboarding Form. These terms form part of the onboarding process and are intended to sit alongside the Investor Onboarding Form, Investor Criteria Form, Deal Sourcing Agreement, Fee Agreement / Reservation Form, and any Joint Venture Agreement where applicable.

By completing and submitting the onboarding form, you confirm that you have read, understood, and agree to these Terms & Conditions.

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## 1. Nature of Service

LetSavvy Ltd operates as a property deal sourcing and introduction company. LetSavvy Ltd sources and introduces property opportunities, related contacts, and associated information to investors and clients.

LetSavvy Ltd does not provide financial, legal, tax, mortgage, valuation, survey, planning, or investment advice. Any information supplied by LetSavvy Ltd is provided for general informational purposes only and should not be relied upon as a substitute for independent professional advice.

Each client or investor should obtain independent legal, tax, mortgage, valuation, survey, planning, accounting, and financial advice where required before entering into any transaction or binding arrangement.

## **2. Investor Responsibility and Independent Verification**

You acknowledge that all opportunities shared by LetSavvy Ltd remain subject to your own independent due diligence, surveys, legal review, financial assessment, professional verification, and commercial judgement.

You remain solely responsible for all acquisition, funding, legal, tax, valuation, planning, survey, compliance, and exit decisions. Any decision to proceed with an opportunity is made entirely at your own risk and discretion.

You must verify all figures, legal matters, property condition, planning position, licensing position, financeability, suitability, and any projected income, resale value, refinance value, yield, cashflow, or profit assumptions before proceeding.

## **3. Investor Criteria and Preferences**

The Investor Criteria Form records your current investment requirements, financial position, and stated buying preferences. You agree to notify LetSavvy Ltd promptly of any material change.

LetSavvy Ltd may use your criteria to filter and present opportunities on a reasonable and best-efforts basis, but does not guarantee deal availability, exclusivity, suitability, profitability, financeability, or that any opportunity will meet all stated criteria exactly.

The criteria form records preferences only. It does not oblige LetSavvy Ltd to introduce opportunities, and it does not create any advisory, fiduciary, agency, partnership, or joint venture relationship.

## **4. Introduced Opportunities**

An Introduced Opportunity includes any property, vendor, agent, developer, intermediary, contact, or related opportunity presented by LetSavvy Ltd, whether verbally, digitally, in writing, or by arrangement of contact, viewing, negotiation, or access to deal information.

For the purposes of these terms, a connected party includes any person or entity acting on behalf of, in connection with, or for the benefit of the client or investor.

## **5. Non-Circumvention**

You agree not to bypass, avoid, or otherwise circumvent LetSavvy Ltd in relation to any Introduced Opportunity, whether directly or indirectly, including through any connected party.

If you, or any connected party, proceeds directly or indirectly with an Introduced Opportunity within the relevant term without involving LetSavvy Ltd or without payment of the agreed fee, the full agreed sourcing fee shall remain payable and enforceable.

## **6. Fees and Payment Terms**

Sourcing fees, reservation fees, or other agreed fees may be confirmed separately within a Fee Agreement, Reservation Form, Deal Sourcing Agreement, written instruction, or other deal-specific document.

Unless otherwise agreed in writing, the sourcing fee becomes payable immediately once the client, or any connected party, enters into any agreement to acquire or reserve an Introduced Opportunity, or otherwise confirms in writing an intention to proceed with the transaction.

Where agreed in writing, the sourcing fee may be paid to a solicitor, regulated by the SRA, acting as stakeholder and shall be treated as paid upon receipt by that solicitor. The sourcing fee shall be held and released in accordance with separate written instructions agreed between the parties. The client shall remain liable for the sourcing fee regardless of any delay or failure by the stakeholder to release funds.

All sourcing and reservation fees are strictly non-refundable once the client proceeds with an Introduced Opportunity, except at the sole discretion of LetSavvy Ltd and only where expressly agreed in writing.

## **7. No Obligation and No Guarantee**

Submitting any form, completing onboarding, or providing investment criteria does not create any obligation on LetSavvy Ltd to provide services, issue introductions, continue discussions, or enter into any further agreement.

LetSavvy Ltd is under no obligation to introduce any opportunity, continue any discussion, or progress any matter where legal, commercial, compliance, suitability, or availability concerns arise.

LetSavvy Ltd does not guarantee deal availability, exclusivity, suitability, profitability, financeability, valuation outcome, refinance outcome, rental performance, resale outcome, or any investment return.

## **8. AML, Compliance and Verification**

You understand and consent that LetSavvy Ltd may use, store, and process the information and documents supplied for onboarding, anti-money laundering, due diligence, compliance, record-keeping, and opportunity matching purposes in accordance with its legal and regulatory obligations.

LetSavvy Ltd may request further documents or information at any stage in order to verify identity, address, source of funds, source of wealth where relevant, company structure, beneficial ownership, overall suitability, and compliance position.

LetSavvy Ltd reserves the right to delay, suspend, or decline any introduction or further engagement where compliance requirements are not satisfactorily met.

## **9. Confidentiality**

All information, documents, contacts, deal details, and opportunity information supplied by LetSavvy Ltd are confidential and supplied solely for your consideration.

You agree not to disclose, distribute, copy, share, or use such information with any third party without the prior written consent of LetSavvy Ltd, unless required by law.

You must not use any confidential information to bypass LetSavvy Ltd or progress an Introduced Opportunity independently or through a connected party.

## **10. Data Protection**

Each party shall comply with all applicable data protection legislation, including the UK GDPR and Data Protection Act 2018.

Personal data may be processed for onboarding, anti-money laundering, compliance, due diligence, record-keeping, communication, and opportunity matching purposes.

## **11. Liability**

To the fullest extent permitted by law, LetSavvy Ltd shall not be liable for any loss arising from reliance on information provided, and the client remains responsible for all decisions and due diligence.

LetSavvy Ltd shall not be liable for any financial loss, investment outcome, valuation outcome, finance outcome, rental performance, resale outcome, third-party action, or professional advice obtained or not obtained by the client.

## **12. Future Agreements and Deal-Specific Terms**

Any onward relationship, specific opportunity, fee arrangement, reservation, deal sourcing engagement, or joint venture arrangement will remain subject to separate written terms where applicable.

Deal-specific documents may include a Deal Sourcing Agreement, Fee Agreement / Reservation Form, Joint Venture Agreement, heads of terms, loan agreement, shareholders agreement, security document, or solicitor-drafted agreement depending on the project structure.

Any requested amendments to an agreement must be agreed in writing by LetSavvy Ltd.

## **13. Joint Venture Position**

Any joint venture template or heads of terms is intended to record the principal commercial understanding between parties working together on a property investment project.

Unless expressly stated otherwise, such a template is a non-binding record of commercial terms only and does not create legally binding obligations, except in relation to confidentiality and any provisions expressly stated to be binding.

Completion of any joint venture form does not create any obligation for either party to proceed or enter into any transaction. Each party should obtain independent legal, tax, accounting, and financial advice before entering into a binding arrangement.

## **14. Disputes, Authority and Binding Position**

Neither party may bind the other, incur liabilities, make representations, enter into contracts, provide guarantees, vary agreed terms, or hold themselves out as having authority except to the extent expressly agreed in writing.

Any dispute, disagreement, or allegation of breach is to be raised in writing first, with the parties to meet in good faith to resolve the issue. If a resolution is not reached, the parties shall attempt to resolve the matter through mediation or other agreed alternative dispute resolution method before commencing court proceedings, save in cases where injunctive or other urgent relief is required.

## 15. Legal Jurisdiction

These Terms & Conditions shall be governed by and construed in accordance with the laws of England and Wales.

## 16. Declaration

By submitting the onboarding form, you confirm that the information provided in the form and in any supporting documents is true, accurate, complete, and not misleading to the best of your knowledge.

You confirm that you have read, understood, and agree to these Terms & Conditions, and you agree to notify LetSavvy Ltd promptly of any material change.

You acknowledge that LetSavvy Ltd may rely on the information supplied for onboarding, compliance, record-keeping, and opportunity matching purposes.

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### **Required acceptance wording for onboarding form:**

I confirm I have read and agree to the LetSavvy Ltd Terms & Conditions.

The Investor Onboarding Form should not be capable of submission unless this confirmation is ticked.