



GUIDE · INVEST

Documents: *building, business, premises*

Checklists for selling a building, transferring a business or letting premises, and the documents a buyer should request before making an offer.

3 years of management accounts or financial years	3 MB at most per uploaded file	Your consent before anything is passed to a buyer
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01 IN BRIEF

A building is judged on documents

Without documents, no figure can be confirmed, and no bank will commit. The sooner the file is complete, the faster the buyer and their bank decide.

There is no need to have everything on day one: we tell you where to obtain what is missing.

02 SELLING A BUILDING

Documents *for an investment property*

☐ Up-to-date rent roll☐ Leases and amendments☐ Property management accounts for the last three years☐ Works completed and planned☐ Land register extract☐ Plans☐ Title deed☐ Cadastral plan☐ CECB☐ Buildings insurance

Also useful: known easements and annotations, amount and maturity of the mortgage, timing constraints.



The CECB

The cantonal energy certificate for buildings is required for any sale in the canton of Vaud. If it is missing, we order it from a certified expert as soon as the mandate is signed; it is at the seller's expense.



03 TRANSFERRING A BUSINESS

Documents *for a business*

- ☐ Balance sheets and income statements for the last three financial years
- ☐ Commercial lease and amendments

- ☐ Inventory of fittings and equipment
- ☐ Operating licences
- ☐ Staff and current contracts

**Confidentiality**

The business is presented anonymously. The address, trading name, accounts and photographs are given only after a signed confidentiality undertaking, to a buyer whose plans and financing have been verified. The figures declared by the seller are checked against the accounts.

04 LETTING PREMISES

Documents *for premises and offices*

- ☐ Plans and floor areas
- ☐ Current rent and charges

- ☐ Permitted use
- ☐ Availability

05 UPLOADING

Your documents, *in your seller portal***The format**

PDF, JPG or PNG, 3 MB at most per file; a photo taken with your phone is fine.

**Reading**

A rent roll is read by artificial intelligence, which writes a summary and flags warning points, checked by the broker.

**The protected area**

Your documents are consulted only by your broker.

**Your consent**

A document is passed to a buyer only with your consent.



06 THE BUYER'S SIDE

Documents to request *before making an offer*

Income

- | | |
|--|---|
| ☐ Signed and dated rent roll | ☐ History of re-lettings and arrears |
| ☐ Copies of all leases and amendments | ☐ Current disputes and challenges |
| ☐ Receipts for the last twelve months | |

Charges

- | | |
|---|--|
| ☐ Service charge statements for the last two years | ☐ Property tax and tax value |
| ☐ ECA and liability insurance policies | ☐ Current maintenance contracts |
| ☐ Management and caretaking contracts | |

The building

- | | |
|--|---|
| ☐ Land register extract and easements | ☐ Works completed and to come |
| ☐ Plans and floor areas by unit | ☐ Permits and any cantonal restrictions on let housing |
| ☐ CECB energy certificate | |

These documents confirm the figures of the yield calculation (document D20). Alexandre can go through the property with you: leases, market rents, works.

Gathering *your file*

A first conversation in confidence: we tell you which documents to gather, and where to obtain them.

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