

The Fee Protection Checklist

Seven checks to run before you send any deal pack. Miss one and an investor can go straight to the vendor, and your fee goes with them. Tick all seven and you have the paperwork to prove the introduction was yours.

1**Are you compliant before you send anything?**

Anti money laundering supervision with HMRC, a property redress scheme (The Property Ombudsman or the Property Redress Scheme), ICO registration and professional indemnity insurance. A fee agreement is much harder to enforce without them.

☐**2****Have you checked the investor is real?**

Ask for ID and proof of funds before you share a single detail. Serious buyers expect it. Time wasters and deal fishers usually disappear at this step.

☐**3****Is the NDA signed before the address goes out?**

Not "I'll sign it later". Not a PDF sitting unopened in their inbox. Signed, dated and saved before they can identify the property.

☐**4****Is your fee agreement signed, and does it cover going direct?**

It should state your fee, when it's payable, and that the fee is still due if they buy without you (a non circumvention clause), for a set period after your introduction.

☐**5****Does your deal pack give the property away?**

Check every page and photo for the house number, street name, agent branding, a recognisable street view or a postcode in the file name. One clue is enough to find it on Rightmove.

☐**6****Do you know who opened your pack, and when?**

If an investor viewed the deal three times then went quiet, you want to know. A time stamped record of who saw what is also strong evidence if a fee is disputed.

☐**7****Is every introduction on record?**

The date, the investor, the property and the documents they signed, in one place. Not spread across WhatsApp, email and a spreadsheet. If you can't find it in 30 seconds, you can't prove it.

☐**SourceDesk does checks 3 to 7 for you**

Investors sign your NDA and fee agreement online before the address unlocks. You see who opened each pack, and every introduction is logged against the investor and the property.

[See how it works](#)