Changing a block managing agent

Practical handover checklist

For RMC and RTM directors, freeholders and others authorised to appoint an agent in England.

01 Decision and notice

- ☐ Confirm who can appoint or replace the agent under the building's arrangements.
- ☐ Check the existing management agreement, notice period and required method of notice.
- ☐ Record the decision and who is authorised to give instructions.
- ☐ Name a client contact to keep the handover moving.

02 Timeline and contacts

- ☐ Agree the outgoing agent's last day and incoming agent's first day.
- ☐ Set dates and owners for the records, funds and access items below.
- ☐ Keep a separate escalation route for urgent repairs and safety actions.
- ☐ Tell contractors who may instruct work after the change.

03 Building records

- ☐ Request leases, site plans, unit schedules and current management agreements.
- ☐ List insurance, supplier contracts, keys, access codes and emergency contacts.
- ☐ Collect inspections, risk assessments and open remedial actions.
- ☐ Log missing records and agree who will follow each gap up.

04 Money and service charges

- ☐ Request budgets, latest accounts, bank and reserve-fund positions.
- ☐ List arrears, unpaid invoices, disputed items and committed expenditure.
- ☐ Agree who prepares final accounts and reconciles transferred balances.
- ☐ Check what the lease and agreement require before communicating charges.

05 Repairs and planned work

- ☐ List active repairs, maintenance contracts and planned projects.
- ☐ For each item, note the contractor, approval, cost, next date and owner.
- ☐ Flag any consultation, insurance renewal or safety deadline in progress.
- ☐ Check the incoming agent has the information needed for continuity.

06 Residents and first review

- ☐ Tell residents the change date and the routine and urgent contact routes.
- ☐ Transfer open enquiries and complaints using an agreed secure method.
- ☐ Confirm who will update residents on existing issues.
- ☐ Review gaps, cash, contracts and urgent actions with the new agent.

Use this with the lease and management agreement. This is a planning aid, not legal advice.

Full guide: surveyorandco.co.uk/changing-block-managing-agent-london

Independent guidance: lease-advice.org