

# The Essential Landlord's Guide

## Switching Managing Agents



## Introduction

Your letting agent should make life easier — handling rent, keeping your property compliant, and ensuring tenants are happy. But if communication is poor, repairs take too long, or you simply feel you're not getting the service you pay for, it may be time to consider a change.

Many landlords assume they must wait until a tenancy ends to switch agents, but that's not the case. Even with tenants in place, you can move to a new agent — provided you follow the correct process. The key is to manage the transition smoothly, protecting both your investment and your tenant's experience.



This guide takes you through the essential steps — from checking your current agreement and gathering paperwork to resolving any issues and introducing your new agent to your tenants. With the right preparation, switching agents can be straightforward and stress-free.



## Checking Your Current Terms

Before making any move, your first job is to revisit your existing Terms of Business with your current letting agent. This document will outline exactly how and when you can end your agreement. If you can't find your terms - send an email to your agent asking them the process for giving notice.

Look for:

- **Notice period** — how much time you must give before the agreement ends.
- **Termination fees or penalties** — some agreements include exit charges.
- **Ongoing commission clauses** — where the agent claims a fee if the same tenant stays in the property after you leave.



Understanding these points upfront will help you plan your timing, avoid unnecessary costs, and keep the changeover legally sound. Whilst some clauses may seem unfair, if you signed and entered into the agreement you will likely be legally bound by them - always read through carefully!



## Gather All Relevant Documentation

The smoother the handover, the better the start with your new agent. Having all the paperwork ready ensures nothing important gets missed. Ideally you providing copies would be the most efficient way of doing things but you can also authorise your current agent to liaise directly with your new agent to sort documents between themselves.

Key documents include:

- **Assured Shorthold Tenancy (AST)** — the contract between you and your tenant.
- **Tenant references** — employment, previous landlord, and credit checks.
- **Proof of tenant identity and right-to-rent checks** — essential for compliance.
- **Inventory report** — ideally from the start of the tenancy, showing the property's condition.
- **Inspection reports** — to track how the property has been looked after.
- **Tenant contact details** — including phone numbers and email addresses.
- **Deposit information** — details of the deposit protection scheme and certificate.
- **Compliance certificates** — such as Gas Safety, Electrical Installation Condition Report (EICR), and EPC.



Your new agent will need all of these to legally and effectively manage your property.





## Transfer the Management



Once your notice period has ended and your documents are ready, the handover to your new agent can begin. This step is all about ensuring a smooth, well-organised transition.

It is usually simplest to try and time the takeover to line up with a rental/management pay period so that there is no confusion over who is managing the property at any given time.

Handled correctly, this stage means your tenant experiences a seamless change, and your new agent can get to work immediately without chasing missing information.

Typically, this involves:

- **Providing all paperwork promptly** — tenancy agreements, deposit details, compliance certificates, and maintenance records should be passed to your new agent without delay.
- **Notifying your tenant** — a friendly introduction letter or email reassures them, confirms the changeover date, and provides new contact details or payment instructions.
- **Transferring the deposit** — if your previous agent holds it, arrange for a direct transfer to your new agent, making sure it remains protected in an approved scheme.





## What Happens Next

At JDG Estate Agents, once we have the paperwork in place:

- You will be assigned a dedicated property manager who will set you up on our system and carry out the legal sanctions check, ownership and ID checks.
- We contact your tenant directly to introduce ourselves, reassuring them that we are here to help and that there is nothing to worry about. We will explain how we'll manage the property, and provide our contact details.
- We carry out a Right to Rent check (a legal requirement for all landlords and agents) before we sign any new paperwork
- We prepare new tenancy contracts using our own tried-and-tested solicitor written templates — this makes enforcement and legal processes much easier should any issues arise. Both you and your tenants will need to sign these using our seamless e-signing process.
- We then provide our bank details for all future payments

Our aim is to make the transition seamless, so both you and your tenant feel supported from day one.





If you're unhappy with your current letting agent, you don't have to settle for poor service. Switching agents — even with a tenant in place — is possible and can be straightforward when you follow the right steps.

At JDG Estate Agents, we specialise in smooth agent transfers, handling the process from start to finish. We ensure every legal requirement is met, every document is in order, and your tenant is kept fully informed. The result? Better service, better communication, and a property that's in safe hands.



[www.jdg.co.uk](http://www.jdg.co.uk)



[josh@jdg.co.uk](mailto:josh@jdg.co.uk)



01524 843322



07983444495

