

Registering for PEXA

Registration on the PEXA website involves 8 steps:



1. Your Organisation details
2. Your Contact details
3. Trust Account or PEXA Source Account
4. Direct Debit
5. Practising Certificate or Conveyancing Licence
6. Land Registry Contact
7. Digital Certificate
8. Forms and Supporting Documentation

Please take note of the important points highlighted below to assist in the completion of the registration process:

Your Initial Registration Details

- Complete your initial registration details, including Legal Entity Name and Business Name.
- The Legal Entity Name populates from the ABN Lookup.

*It is very important that your **Legal Entity Name** is correct. **Business Name** is displayed as your Subscriber name in PEXA*

You may need to over-ride the Legal Entity

- **Trust:** If the ABN belongs to a trust, the legal entity name will not populate correctly. You will need to manually type in the name of the trustee. For example, "ABC Pty Ltd as trustee for the ABC Trust".
- **Partnership:** Your legal entity name should be the names of the partners or the firm name. The words "& others" are not acceptable.
- **Company:** If your legal entity is a company (including where the company is the trustee of a trust) your legal entity name will end in "Pty Ltd"

Accessing PEXA

- Choose whether you will access PEXA directly or through a Sponsor

Once Sponsors are integrated with PEXA, you will be able to access PEXA via your selected Sponsor. In the interim, you can access PEXA directly.

Step 1: Organisation Details



- Select your Entity Type to start the organisation details section.

Individual

- Select whether you are acting as the **trustee of a trust**

If your ABN belongs to a trust, upload a certified copy of your trust deed or certified copy of the schedule to your trust deed at Step 8

- Business Unit is **not required**. If you enter a business unit, it will appear as your Subscriber name in PEXA.

Company

- Select whether the PEXA documents will be signed by a Sole Director and Company Secretary
 - Note: Select “no” if the company’s ASIC records list multiple directors
- Select whether your organisation is acting as the **trustee of a trust**
- Enter the name of your Business Unit if your department has a name and you wish to differentiate between departments.
- Enter your ACN (this is a 9 digit identifier issued by ASIC)

If entered, Business unit appears as your Subscriber name in PEXA

Partnership

- Select whether your organisation is acting as the **trustee of a trust**
- Select how the partnership will evidence authority of the person signing contracts on behalf of your organisation.
 - You must select “partnership deed” however you can provide a statutory declaration instead.

If you wish to provide PEXA with a statutory declaration instead of a Partnership Deed, it must:

- name all of the partners or annex a schedule of names (if your Legal Entity Name is the names of the partners) or confirm the firm name (if your Legal Entity Name is the name of your firm)
- confirm which one (or more) partners are authorised to sign contracts on behalf of the partnership and whether that authority is joint or joint and several
- be declared by one or more partners

Step 2: Contact Details



- Enter the names of the person(s) who will sign the contracts on behalf of your organisation (Authorised signatories)
 - This person(s) must have authority to bind the organisation.
 - **Company** - the person(s) who signs the PEXA documentation must be listed as a director(s) / secretary with ASIC.
 - **Partnership** - the person(s) who signs must be listed as a partner in the partnership deed or have their authority to sign confirmed in the statutory declaration
 - **Sole trader** – the person who signs should be that individual

If the person who executes the documents on behalf of the organisation does not fall into one of the above categories, you must provide additional evidence of that person's authority to bind the organisation e.g. letter of authority

- Select who will be the **Subscriber Manager**

*The **Subscriber Manager** is the member of your organisation who will be responsible for managing your Subscriber Profile and will receive the first PEXA digital signing certificate*

- Select who will be the **Financial Contact**
- Select who will be the **Public Contact**

*The **Public contact** is your preferred contact person for contact by other PEXA Subscribers*

Step 3: Trust Account or PEXA Source Account



If you have a statutory trust account

- Select the Bank Name from the list.
- Complete details of your trust account
- Select the current **signing requirements** of your trust account
 - If the current signing rules do not fall into either category, select “other”. Type your requirements into the blank field.
- Enter the details of the **PEXA Payment Authorises**
 - List the authorised signatories to your trust account who you would like to nominate to authorise trust account instructions in the PEXA System.
- If your signing rules require a primary signatory to sign, tick the box for “Primary Signatory” next to that person’s name.
- Enter the details of the **Trust account owners**

If your Financial Institution is not integrated with PEXA, you have the option to complete the PEXA Source Account Form at Step 8

If you do not have a statutory trust account

- Select “None”.

You have the option to complete the PEXA Source Account Form at Step 8

Step 4: Direct Debit Details



- Enter the details of your office account
- Select the account signatories
 - The account signatories are the person(s) who are authorised to sign direct debit requests
- Enter the account signatories' capacity for signing and address

This account will be used to direct debit Land Registry and PEXA Fees for transactions not involving financial settlement, as well as fees for PEXA Digital Certificates

Step 5.1: Operating Jurisdictions



- Tick the boxes next to the jurisdictions that your organisation wishes to operate in.

Step 5.2: Practising Certificate or Conveyancing Licence details



Practising Certificate

- Enter the details for one practitioner who holds a **Principal practising certificate**
 - An employee practising certificate is not acceptable

Upload a copy of the practising certificate at Step 8

Conveyancing Licence

- Enter the details for an individual licensee
 - **Note:** If you are a Settlement Agent in WA, please provide details of your triennial certificate instead.
- If your entity is a corporation, you will also need to enter details of the corporate licensee

Upload a copy of the conveyancing licence (Triennial Certificate(s) in WA) including a copy of corporate licence (if applicable) at Step 8

Step 6: Land Registry Contact Details



- Enter Land Registry contact details for each jurisdiction that you have selected
- If you have selected WA or QLD, please provide details of your Duty Disbursement Account if you would like stamp duty to be paid as part of Financial Settlement in PEXA.
 - In WA, this must be a trust account.
 - For WA and QLD, if you do not provide details of your Duty Disbursement Account, stamp duty must be paid outside of the PEXA System.
- Enter the details of the person who will be the Land Registry's contact in relation to fees and payments
- Enter the details of the person who will be the Land Registry's contact in relation to any queries about lodgement, including requisitions.

Step 7: Digital Certificate



- Select whether you would like to obtain a new PEXA Digital Certificate or already have an existing Digital Certificate that can be used in PEXA.

If you would like to order a PEXA Digital Certificate, complete the PEXA Digital Signing Certificate Subscriber Agreement at Step 8

- **Note:** at least one person who is authorised to sign Registry Instruments (e.g. Australian legal practitioner or licensed conveyancer) should hold a Digital Certificate.

Step 8: Forms and Supporting Documentation



- Print and execute the documents
- Upload the executed documents plus any supporting documentation

Before uploading the documents, check:

- *The correct Legal Entity Name has been included in the documentation*
- *The documents have been executed correctly*

*PEXA Support Centre
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