

# Adlington House, Portishead

## Key Facts for Leaseholders (2020/2021)



### Property Details

<b>Name of operator</b>	MHA - Methodist Homes
<b>Name of scheme</b>	ADLINGTON HOUSE 132a Slade Road, Portishead, Bristol, BS20 6BB
<b>Description</b>	<p>50 Apartments:</p> <p>10 x 1-bed 33 x 2-bed 7 x 3-bed On 5 floors (2 lifts).</p> <p>All have balconies or patios and many have en-suite shower rooms.</p> <p>Kitchens are fully fitted with a hob, built in oven, fridge freezer, and dishwasher and built in microwave. Utility rooms have connections for washing machines and condenser dryers.</p>
<b>Status of apartments</b>	Purpose-built in 2015. Pre-Owned.
<b>Occupancy</b>	For one or two people.
<b>Tenure</b>	Leasehold. 125 years from 1st January 2015
<b>Care provider</b>	<p>Residents can choose a care agency of their choice.</p> <p>MHA does provide personal care with our onsite team dependent on staffing resources at the time. We will endeavour to meet your needs where possible.</p>

*For further information please see the **Residents' Handbook***

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### Charges when leaving, selling or subletting the property

#### Contingency Fund contribution

A contribution to the Contingency Fund is payable on sale or a transfer of ownership. The Fund covers spending for the repair or renewal of communal areas, roofs, lifts, etc. The contribution is 0.5 % of the open market value at the point of sale/ transfer, for each year or part-year of ownership.

**Example:** a leaseholder who sells a property owned for five years for £250,000 will have to pay £6250, calculated as follows:

- 0.5% of £250,000 = £1,250
- 5 years x £1,250 = £6,250
- Contingency Fund Contribution = £6,250

#### Communal Facilities fee

This Fee contributes to the costs of providing the communal facilities (restaurant, lounges, activity and craft room, guest suite, offices, mobility scooter store, hairdressing salon and specialist assisted spa and therapy room).

The fee is 1.25% of the open market value of the apartment for each year of ownership, capped at 10 years, payable when the leaseholder sells the apartment, gives it away, or sublets it. Any part of a year shall be calculated as a full year. This deferred fee is also payable in turn by all future occupiers.

**Example:** a leaseholder who sells a property owned for five years for £250,000 you will have to pay £15,625, calculated as follows:

- 1.25% of £250,000 = £3,125
- 5 years x £3,125 = £15,625
- Communal Facilities Fee = £15,625

#### MHA administration fee for sale

Covers the costs of processing sale documents, dealing with enquiries from solicitors and signing documents. The fee is at least £499 including VAT.

*Charges when leaving, selling or subletting the property continue on the next page.*

# Adlington House, Portishead

## Key Facts for Leaseholders (2020/2021)



### Charges when leaving, selling or subletting the property (continued)

#### Other costs

The leaseholder (or leaseholder's estate) remain liable for all charges due under the terms of the lease including service charge, wellbeing charge and ground rent until sale of the property has completed.

Leaseholders are required to redecorate once every seventh year and maintain the property to be in good condition and repair.

Leaseholders will have to pay the usual costs associated with any property sale.

#### Subletting charges

Properties may be 'sublet' in the form of a permitted underlease only to an Approved Purchaser in accordance with the terms of the lease.

The proposed occupier would need to be assessed by MHA before any assignment or 'underletting'.

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### Cost of moving in to the property

<b>Asking price</b>	This is set by the private vendor.
<b>Deposit</b>	Agreed between the parties for a re-sale.
<b>Other costs</b>	MHA do not charge for a care assessment. The person moving in will be responsible for their own legal and removal costs.

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### Ongoing charges payable to MHA

<p><b>Service Charge</b></p>	<p>The service charge is payable in advance for the month ahead.</p> <p>This covers communal cleaning and maintenance, external window cleaning, water and sewerage, buildings insurance and estate management. It includes the costs of heating, lighting and water for the communal areas only.</p> <p>MHA does not receive any incentives from suppliers for services paid for through the service charge.</p>	<p>1-bed: £60.16 per week 2-bed: £76.26 per week 3-bed: £94.46 per week</p> <p><b>(Note:</b> Leaseholders are charged on a calendar monthly basis in line with the terms of the lease)</p>
<p><b>Utilities Charge</b></p>	<p>Water charges are included in the service charge.</p>	<p>-</p>
<p><b>Wellbeing Charge</b></p>	<p>Wellbeing Charge is payable in advance for the month ahead.</p> <p>This includes 24 hour staffing on site, help in an emergency and the co-ordination of an activities and events programme.</p>	<p>£59.15 per week (per apartment)</p> <p><b>(Note:</b> Leaseholders are charged on a calendar monthly basis in line with the terms of the lease)</p>
<p><b>Emergency Response</b></p>	<p>24-hour Emergency Response is provided through the <b>Wellbeing Charge</b>. This is not a care service but will provide support during an emergency, and may involve co-ordinating external agencies.</p> <p>Any agreed night care package will be included in your care and support plan, form part of your care agreement and be charged for separately.</p>	<p>Provided through the Wellbeing Charge</p>

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### Care costs

<b>Nursing Care</b>	MHA does not provide nursing care at this location.	-
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*For further information please contact the **Scheme Manager***

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### Additional MHA Services

<b>Maintenance service</b>	Maintenance carried out within a residents own property. <b>For example:</b> small jobs and repairs	£18.66 per hour <b>(Note:</b> This is chargeable in 15 minute intervals.)
<b>Domestic service charge</b>	This covers the cost of any domestic service that is individual to you and provided by MHA. <b>For example:</b> for housework (vacuuming, dusting, cleaning kitchens/bathrooms etc.)	£18.66 per hour <b>(Note:</b> This is chargeable in 15 minute intervals.)
<b>Escort service</b>	An escort service is available. <b>For example:</b> for a member of staff to accompany you to appointments, to go shopping etc. if required.	£18.66 per hour <b>(Note:</b> This is chargeable in 15 minute intervals.)
<b>Guest room</b>	A guest room is available.	£26.52 per room (£10.20 per extra guest)

*All additional services quoted are the same cost at weekends and Bank holidays*

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### Ongoing costs to external bodies

<b>Utility bills</b>	It is the Residents responsibility to arrange contracts with utility suppliers.	-
<b>Council tax</b>	It is the Residents responsibility to arrange payment of Council Tax.	-
<b>TV licence</b>	<p>It is the Residents responsibility to buy their own TV licence.</p> <p>A free licence is available by application to those over 75, who are also in receipt of pension credit.</p> <p>If you are blind (severely sight impaired), you are eligible to apply for a 50% concession.</p> <p>The costs of the TV licence for guest suite are split across all units and included in the service charge.</p> <p>For further information, further information, please visit <a href="http://www.tvlicensing.co.uk">www.tvlicensing.co.uk</a>.</p>	£157.50 annual charge
<b>Internet &amp; Telephone provider</b>	<p>Free Wi-Fi is provided in communal areas only.</p> <p>Residents are responsible for arranging their own broadband supplier and telephone lines.</p>	-

*For further information please see the Residents' Handbook*



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### Insurance arrangements

<b>Responsibility of the operator (MHA)</b>	Communal Buildings Insurance, Public Liability and Employers' Liability are Included in the service charge.
<b>Responsibility of the owner</b>	Home contents insurance is strongly recommended. Residents can select their own provider. There is an option of taking insurance out with MHA. The Manager can provide details of a policy for MHA residents.

*For further information please see the Residents' Handbook*

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### Understanding the Contingency Fund

#### **What is the Contingency Fund?**

This is funded from deferred fees and covers spending for the repair or renewal of communal areas, roofs lifts, etc., identified from stock condition surveys.

*For further information please see the Residents' Handbook*

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### Restrictions

#### Restrictions on selling the property

Purchasers must satisfy the scheme's criteria (including age and support needs). The Manager will assess this prior to purchase. If an individual has personal care needs this will be assessed prior to purchase to ensure these can be met either by MHA or a care agency chosen by the purchaser.

*For further information please see the **Residents' Handbook***

<b>Date</b>	1 <sup>st</sup> October 2020
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For further information on any items, please contact the **Scheme Manager**.

We encourage you to discuss your housing options with your family and friends, and to seek independent advice, support and representation as appropriate, in connection with a move to an MHA retirement community.

MHA encourage all customers to take independent property valuations, legal and financial advice before signing a document produced in connection with the acquisition of a property.