

Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Property Details

Name of operator	MHA - Methodist Homes
Name of scheme	ADLINGTON HOUSE Heaton Chapel, Stockport, SK4 5LT
Description	<p>52 Apartments:</p> <p>9 x 1-bed 39 x 2-bed 4 x 3-bed</p> <p>On four floors (two lifts available). Most kitchens are fully fitted with a hob, built-in oven, fridge/freezer, dishwasher and microwave. Utility rooms have connections for washing machines and condenser dryers.</p> <p>There are electric heaters in each room and an electric fire in the lounge area.</p>
Status of apartments	Purpose-built in 2013. Pre-Owned.
Occupancy	All 1-bed and 2-bed apartments are for one or two people. The 3-bed apartments are for up to three people.
Tenure	Leasehold. 125 years from 1st January 2013.
Care provider	<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***

Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



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 Residents sell 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 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, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



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

Other costs

The owner (or the owner's estate) will remain liable for all charges due until the re-sale has been completed.

This includes service charges, wellbeing charges and ground rent charges as applicable.

Owners to redecorate at least once in every seven years and in the event that the property is being sold back to MHA, the owners may need to redecorate otherwise they may be charged for any repairs and redecoration that MHA deems necessary to put the property in good order for them to re-sell.

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

Subletting charges

Properties may be sublet in accordance with terms of the lease only to an approved occupier who satisfies the scheme's criteria and only with written approval from MHA.

Subletees may be required to undergo referencing (and pay a fee for this) prior to approval being given by MHA.

The owner will need to pay MHA's legal fees for the sublet and the Contingency Fund contribution and will remain liable for the Service and Wellbeing charges.

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Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Cost of moving in to the property

Asking price	This is set by the private vendor.
Deposit	Agreed between the parties for a re-sale.
Other costs	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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Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Ongoing charges payable to MHA

Service Charge	<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.</p> <p>MHA does not receive any incentives from suppliers for services paid for through the service charge.</p>	<p>1-beds: £84.63 per week 2-beds: £96.02 per week 3-beds: £109.87 per week</p> <p>(Note: Leaseholders are charged on a calendar monthly basis in line with the terms of the lease)</p>
Utilities Charge	<p>It is the Residents responsibility to arrange contracts with utility suppliers.</p>	N/A
Wellbeing Charge	<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>£57.93 per week (per apartment)</p> <p>(Note: Leaseholders are charged on a calendar monthly basis in line with the terms of the lease)</p>
Emergency Response	<p>Emergency response is covered by the Wellbeing charge.</p> <p>This is not a care service but will provide support in a medical emergency and will co-ordinate calls to GP or emergency services.</p> <p>Any other night care will be included in your care plan(s) and form part of your care agreement(s) and will be charged for separately.</p>	<p>Covered by the Wellbeing Charge</p>

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Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Care costs

Personal care charge	<p>This covers the cost of any personal care that is individual to you and provided by MHA.</p> <p>This will depend on staffing resources at the time. We will endeavour to meet your needs whenever possible.</p> <p>For example: for washing, dressing, medication assistance, etc.</p>	<p>£19.03 per hour</p> <p>(Note: This is chargeable in 15 minute intervals.)</p>
Nursing Care	<p>MHA does not provide nursing care at this location.</p>	-

*For further information please contact the **Scheme Manager***

Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Additional MHA Services

Maintenance service	Maintenance carried out within a residents own property. For example: small jobs and repairs	£19.03 per hour (Note: This is chargeable in 15 minute intervals.)
Domestic service charge	This covers the cost of any domestic service that is individual to you and provided by MHA. For example: for housework (vacuuming, dusting, cleaning kitchens/bathrooms etc.)	£19.03 per hour (Note: This is chargeable in 15 minute intervals.)
Escort service	An escort service is available. For example: for a member of staff to accompany you to appointments, to go shopping etc. if required.	£19.03 per hour (Note: This is chargeable in 15 minute intervals.)
Guest room	A guest room is available.	£26.52 per room (£6.12 per extra guest)

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

Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Ongoing costs to external bodies

Utility bills	It is the Residents responsibility to arrange contracts with utility suppliers.	-
Council tax	It is the Residents responsibility to arrange payment of Council Tax.	-
TV licence	<p>It is the Residents responsibility to buy their own TV licence.</p> <p>A free licence is available on application to those over 75.</p> <p>If you are blind (severely sight impaired), you are still able 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>	£157.50 annual charge
Internet & Telephone provider	<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>	-

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Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



Insurance arrangements

Responsibility of the operator (MHA)

Communal Buildings Insurance, Public Liability and Employers' Liability are Included in the service charge.

Responsibility of the owner

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.

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Adlington House, Heaton Chapel

Key Facts for Leaseholders (2020/2021)



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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Key Facts for Leaseholders (2020/2021)



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.

MHA has an option to buy back the property if we choose to. If we do buy back the property we will do so at 95% of the open market value as determined by an independent valuer.

For further information please see the Residents' Handbook

Date	1 st April 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.