

# HATHERLOW HOUSE: KEY FACTS FOR LEASEHOLDERS

## Property details

Section	Details
<b>Name of operator</b>	MHA - Methodist Homes
<b>Name of scheme</b>	HATHERLOW HOUSE 27 Park Crescent, Southport, PR9 9LR
<b>Description</b>	33 apartments:  13 x 1-bed 20 x 2-bed  On 3 floors (two lifts.) Unfurnished, gas central heating, fitted kitchen with hob, oven, fridge/freezer.
<b>Status of apartments</b>	Purpose-built in 2013. Pre-Owned.
<b>Occupancy</b>	One or two people can live in each apartment.
<b>Tenure</b>	Leasehold. 125 years from and including 1st August 2013.
<b>Care provider</b>	Residents can choose a care agency of their choice.  MHA provide personal care for those who wish to purchase this from MHA care and support team.
<b>Further information</b>	Please see the Residents' Handbook and the Care Service Guide



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## Charges when leaving, selling or subletting the property

Section	Details
<b>Contingency Fund contribution</b>	<p>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 1 % of the 'open market value' at the point of sale/ transfer, for each year or part-year of ownership.</p> <p><b>Example:</b> A leaseholder who sells a property owned for five years for £250,000 will have to pay £12,500 calculated as follows:</p> <ul style="list-style-type: none"> <li>• 1% of £250,000 = £2,500</li> <li>• 5 years x £2,500 = £12,500</li> <li>• Contingency Fund Contribution = £12,500</li> </ul>
<b>MHA administration fee for sale</b>	Covers the costs of processing sale documents, dealing with enquiries from solicitors, and signing documents. The most the fee is likely to be is at least £499 including VAT.
Charges when leaving, selling or subletting the property continue on the <b>next page</b> .	

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

Section	Details
<b>Other costs</b>	<p>The owner (or the owner's estate) will remain liable for all charges due until the re-sale process has been fully completed.</p> <p>This includes service charges, wellbeing charges and ground rent charges as applicable.</p> <p>Owners will have to pay the usual costs associated with any property sale.</p>
<b>Subletting charges</b>	<p>Properties may be sublet in accordance with terms of the lease only to an approved occupier who satisfies the schemes criteria and only with written approval from MHA.</p> <p>Sublessees may be required to undergo referencing (and pay a fee for this) prior to approval being given by MHA.</p> <p>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.</p>
<b>Further information</b>	Please see the Residents' Handbook

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## Cost of moving in to the property

Section	Details
<b>Asking price</b>	Is set by MHA if the first sale, or sale of a bought-back property where Guaranteed Buy Back was agreed at point of sale. Otherwise this is determined by the private vendor.
<b>Deposit</b>	A reservation fee of £1,000 is payable if purchased from MHA. Agreed between the parties for a private 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.
<b>Further information</b>	Please see the Residents' Handbook



# HATHERLOW HOUSE: KEY FACTS FOR LEASEHOLDERS

## Ongoing charges payable to MHA

Section	Details	Cost
<b>Service Charge</b>	<p>Service Charge is payable in advance for the month ahead – and changes annually in April.</p> <p>It covers communal cleaning and maintenance, external window cleaning, water and sewerage, buildings insurance and estate management.</p> <p>It includes the costs of heating, lighting and water for the communal areas and heating, water and hot water in the apartments and one per meal per for two residents.</p> <p>MHA does not receive any incentives from suppliers for services paid for through the service charge.</p>	<p><b>1-bed:</b> £78.42 per week <b>2-bed:</b> £106.45 per week</p>
<b>Utilities Charge</b>	<p>Heating, water and hot water in the apartments is included in the service charge.</p>	<p>Included in the Service Charge</p>
<b>Wellbeing Charge</b>	<p>The 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>£98.96 per week</p>
<p>Ongoing charges payable to MHA continue on the <b>next page</b>.</p>		



## HATHERLOW HOUSE: KEY FACTS FOR LEASEHOLDERS

### Ongoing charges payable to MHA (continued)

Section	Details	Cost
<b>Emergency Response</b>	<p>Emergency response is covered by the <b>Wellbeing charge</b>.</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>	Covered by the Wellbeing Charge
<b>Ground Rent</b>	The first Review Date is April 2018 which is reviewed on this date every fifth year thereafter.	£337.96 per annum for 1 bed £450.61 per annum for 2 bed
<b>Further information</b>	Please see the Residents' Handbook	

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## Care costs

Section	Details	Cost
<b>Personal care charge</b>	This covers the cost of any personal care that is individual to you and provided by MHA. <b>For example:</b> for washing, dressing, medication assistance, etc.	£18.42 per hour This is chargeable in 15 minute intervals.
<b>Nursing Care</b>	MHA does not provide nursing care.	N/A
<b>Further information</b>	Please see the Care Services Guide	

## Additional MHA services

Section	Details	Cost
<b>Maintenance service</b>	Maintenance carried out within a residents own property. <b>For example:</b> for small jobs and repairs	£18.42 per hour 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.)	£18.42 per hour This is chargeable in 15 minute intervals.
<b>Escort service</b>	Carers are available to escort you to medical appointments. <b>For example:</b> for a member of staff to accompany you to appointments, to go shopping etc. if required. This is subject to staff availability.	£18.42 per hour (subject to staff availability) This is chargeable in 15 minute intervals.
<b>Guest room</b>	A guest room is available.	£26.52 per room
All additional services quoted are the same cost at weekends and Bank holidays		



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## Ongoing costs to external bodies

Section	Details	Cost
<b>Utilities charge</b>	It is the Residents responsibility to arrange contracts with utility suppliers for electricity.	N/A
<b>Council tax</b>	It is the Residents responsibility to arrange payment of Council Tax.	Band B: £1,477.25 Band C: £1,688.28
<b>TV licence</b>	It is the Residents responsibility to buy their own TV licence.  A free licence is available on application to those over 75.  If you are blind (severely sight impaired), you are still able to apply for a 50% concession.	£154.50 annual charge
<b>Internet &amp; Telephone provider</b>	Free Wi-Fi is provided in communal areas only.  Residents are responsible for arranging their own broadband supplier and telephone lines.	N/A
<b>Further information</b>	Please see the Residents' Handbook	



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## Insurance arrangements

Section	Details
<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.
<b>Further information</b>	Please see the Residents' Handbook

## Understanding the Contingency Fund

Section	Details
<b>What is the Contingency Fund?</b>	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.
<b>Further information</b>	Please see the Residents' Handbook

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## Restrictions

Section	Details
<b>Restrictions on selling the property</b>	<p>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.</p> <p>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.</p>
<b>Further information</b>	Please see the Residents' Handbook

<b>Date</b>	1 <sup>st</sup> April 2019
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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 lease.

