

# FITZWARREN COURT: KEY FACTS FOR LEASEHOLDERS

## Property details

Section	Details
<b>Name of operator</b>	MHA - Methodist Homes
<b>Name of scheme</b>	FITZWARREN COURT Kingsdown Road, Swindon, SN3 4TD
<b>Description</b>	37 Apartments:  3 x 2-Large bed 23 x 2-bed 7 x 1-bed 4 x studio  On 3 floors (one lift), unfurnished, gas central heating, 1 & 2 bed apartments have fitted kitchen with hob, oven, fridge/freezer. Studios have fitted kitchen with fridge and microwave.
<b>Status of apartments</b>	Purpose-built in 2015. All Pre-Owned.
<b>Occupancy</b>	For one or two people
<b>Tenure</b>	Leasehold. 125 years from 1 March 2014
<b>Care provider</b>	Residents can choose a care agency of their choice.  MHA do provide personal care for those who wish to purchase this from the on-site 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>For 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 fee is at least £499 inc VAT.
<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. This includes the Inclusive charges are applicable.</p> <p>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.</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 scheme's criteria and with written approval from MHA.</p> <p>Subleases 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 Inclusive 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>	Set by MHA on sale of a bought-back property or otherwise 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

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## Ongoing charges payable to MHA

### The Inclusive Living Plan

The **Inclusive Living Plan** includes your wellbeing service, food and service charge. Ground rent is also included in the Inclusive charge.

**Wellbeing Service:** This includes 24-hour staffing on site, help in an emergency, signposting to other support, advice, befriending and advocacy services and the co-ordination of an activities and events programme.

**Emergency Response:** this provides support in a medical emergency and will co-ordinate calls to a GP or emergency service, and is included in the **Wellbeing Service**. Any other care will be included in your care plan(s) and form part of your care agreement(s) and will be charged for separately.

**Food Charge:** This includes one meal a day

**Service Charge:** This is based on the weekly charges shown (which vary by the type of apartment, occupancy, and meals provided). It covers building insurance and estate management, external window cleaning, the upkeep of shared facilities, the costs of water and sewerage, heat and power to your apartment and one hour domestic assistance per week. MHA does not receive any incentives from suppliers for services paid for through the service charge.

The charges payable per week for the different apartments, with one or two occupants, are set out below:

Type of Apartment	Weekly Charge
Studio Apartments (1 person – one meal)	£163.99
Studio Apartments (2 people – one meal)	£242.34
1 Bed Apartment (1 person – one meal)	£188.14
1 Bed Apartment (2 people – one meal)	£266.49
2 Bed Apartment (1 person – one meal)	£204.67
2 Bed Apartment (2 people – one meal)	£283.02
2 Bed Large Apartment (1 person – one meal)	£246.59
2 Bed Large Apartment (2 people – one meal)	£324.94

Charges are reviewed on 1st April annually by RPI, based on the September index for the previous year.

#### Further information

Please see the Care Services Guide



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## Care costs

Section	Details	Cost
<b>Personal care charges</b>	This covers the cost of any personal care that is individual to you and provided by MHA. <b>For example:</b> washing, dressing, medication assistance, etc.	£18.56 per hour This can be charged 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 resident's own property. <b>For example:</b> small jobs and repairs.	£18.56 per hour This can be charged 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> housework (vacuuming, dusting, cleaning kitchens/bathrooms etc.)	£15.90 per hour This can be charged in 15 minute intervals.
<b>Carpet cleaning</b>	A carpet cleaning service is available.	£22.85 per unit
<b>Laundry service</b>	A laundry service is available on site.	<b>Laundry:</b> £15.90 per unit <b>Ironing:</b> £15.90 per unit
<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.	£18.56 per hour This can be charged in 15 minute intervals.
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 charges</b>	The gas, water and electricity is included in the Inclusive Charge.	Covered by the inclusive charge
<b>Council tax</b>	It is the resident's responsibility to arrange payment of council tax.	Band B: £1,431.36 Band C: £1,635.84
<b>TV licence</b>	It is the resident's 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 telephone lines and broadband supplier.	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. Leaseholders can select their own provider. There is an option of taking insurance out through MHA. The Manager can provide more information.
<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 (see above) 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 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.

