

ADLINGTON HOUSE, PORTISHEAD:

KEY FACTS FOR LEASEHOLDERS

Property details

Section	Details
Name of operator	MHA - Methodist Homes
Name of scheme	ADLINGTON HOUSE 132a Slade Road, Portishead, Bristol, BS20 6BB
Description	<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>
Status of apartments	Purpose-built in 2015. Pre-Owned.
Occupancy	For one or two people.
Tenure	Leasehold. 125 years from 1st January 2015
Care provider	<p>Residents can choose a care agency of their choice.</p> <p>MHA provide personal care for those who wish to purchase this from MHA care and support team.</p>
Further information	Please see the Residents' Handbook and the Care Service Guide



ADLINGTON HOUSE, PORTISHEAD: KEY FACTS FOR LEASEHOLDERS

Charges when leaving, selling or subletting the property

Section	Details
Contingency Fund contribution	<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 0.5 % of the open market value at the point of sale/ transfer, for each year or part-year of ownership.</p> <p>Example: a leaseholder who sells a property owned for five years for £250,000 will have to pay £6250, calculated as follows:</p> <ul style="list-style-type: none"> • 0.5% of £250,000 = £1,250 • 5 years x £1,250 = £6,250 • Contingency Fund Contribution = £6,250
Communal Facilities fee	<p>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).</p> <p>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.</p> <p>Example: a leaseholder who sells a property owned for five years for £250,000 you will have to pay £15,625, calculated as follows:</p> <ul style="list-style-type: none"> • 1.25% of £250,000 = £3,125 • 5 years x £3,125 = £15,625 • Communal Facilities Fee = £15,625
MHA administration fee for sale	<p>Covers the costs of processing sale documents, dealing with enquiries from solicitors and signing documents. The fee is at least £499 including VAT.</p>
Charges when leaving, selling or subletting the property continue on the next page .	



ADLINGTON HOUSE, PORTISHEAD: KEY FACTS FOR LEASEHOLDERS

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

Section	Details
Other costs	<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 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>
Subletting charges	<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>Subleasees 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>
Further information	Please see the Residents' Handbook

Cost of moving in to the property

Section	Details
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.
Further information	Please see the Residents' Handbook



ADLINGTON HOUSE, PORTISHEAD: KEY FACTS FOR LEASEHOLDERS

Ongoing charges payable to MHA

Section	Details	Cost
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 only.</p> <p>MHA does not receive any incentives from suppliers for services paid for through the service charge.</p>	<p>1 bed: £59.13 per week 2 bed: £74.51 per week 3 bed: £93.81 per week</p>
Utilities Charge	Water charges are included in the service charge .	Included in the Service Charge
Wellbeing Charge	<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>	£57.26 per week
Ongoing charges payable to MHA are continued on the next page .		

ADLINGTON HOUSE, PORTISHEAD: KEY FACTS FOR LEASEHOLDERS

Ongoing charges payable to MHA (continued)

Section	Details	Cost
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>	Covered by the Wellbeing Charge
Further information	Please see the Residents' Handbook	

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KEY FACTS FOR LEASEHOLDERS

Care costs

Section	Details	Cost
Personal care charge	This covers the cost of any personal care that is individual to you and provided by MHA. For example: for washing, dressing, medication assistance, etc.	£18.06 per hour This can be charged in 15 minute intervals.
Nursing Care	MHA does not provide nursing care.	N/A
Further information	Please see the Care Services Guide	

Additional MHA services

Section	Details	Cost
Maintenance service	Maintenance carried out within a residents own property. For example: small jobs and repairs	£18.06 per hour This can be charged 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.)	£18.06 per hour This can be charged in 15 minute intervals.
Escort service	An escort service is available. For example: to go shopping/collect prescriptions.	£18.06 per hour This can be charged in 15 minute intervals.
Guest room	A guest room is available.	£26.52 per unit (£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

Section	Details	Cost
Utility bills	It is the Residents responsibility to arrange contracts with utility suppliers.	N/A
Council tax	It is the Residents responsibility to arrange payment of Council Tax.	2019/2020 annual charges Band C (1-bed): £1510.07 Band D (2-bed): £1698.82 Band E (3-bed): £2076.34
TV licence	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
Internet & Telephone provider	Free wifi is provided in communal areas only. Residents are responsible for arranging their own broadband supplier and telephone lines.	N/A
Further information	Please see the Residents' Handbook	

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Insurance arrangements

Section	Details
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.
Further information	Please see the Residents' Handbook

Understanding the Contingency Fund

Section	Details
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.
Further information	Please see the Residents' Handbook



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Restrictions

Section	Details
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.
Further information	Please see the Residents' Handbook

Date	1 st 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.

