

# Hatherlow House

## Key Facts for Leaseholders (2021/2022)



### Property Details

**Operator** MHA - Methodist Homes

**Scheme** HATHERLOW HOUSE  
27 Park Crescent, Southport, PR9 9LR

**Description** 33 Apartments:  
  
13 x 1-bedroom  
20 x 2-bedroom  
  
On 3 floors (two lifts.) Unfurnished, gas central heating, fitted kitchen with hob, oven, fridge/freezer.

**Status of apartments** Purpose-built in 2013.  
Pre-owned.

**Occupancy** Suitable for one or two people.

**Tenure** Leasehold. 125 years from and including 1st August 2013.

**Care provider** Residents can choose a care agency of their choice.  
  
MHA are able to provide personal care with our onsite team dependent on staffing resources at the time. We will endeavour to meet your needs where possible.

**CQC Rating**



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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 1 % of the 'open market value' at the point of sale/ transfer, for each year or part-year of ownership.

For example: a leaseholder who sells a property owned for five years for £250,000 will have to pay £12,500 calculated as follows:

- 1% of £250,000 = £2,500
- 5 years x £2,500 = £12,500 = Contingency Fund Contribution

**MHA Administration Fee for Sale** Covers the costs of processing sale documents, dealing with enquiries from solicitors, and signing documents. The fee will be at least £354 including VAT.

**Other costs** The owner (or the owner's estate) will remain liable for all charges due until the buy back 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 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'.

### Cost of moving in to the property

**Asking price** Set by MHA (first sale, or sale of a bought-back property) or otherwise by the private vendor.

**Deposit** A reservation fee of £1,000 is payable if purchased from MHA. Agreed between the parties for a private 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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### Ongoing charges payable to MHA

**Service Charge** 1-bed – **£412.00 per month** (per apartment)  
2-bed – **£559.27 per month** (per apartment)

Note: Leaseholders are charged on a calendar monthly basis in line with the terms of the lease. For illustration purposes, the weekly service charges are:

1-bed – **£94.82 per week** (per apartment)  
2-bed – **£128.71 per week** (per apartment)

This is payable in advance for the month ahead.

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 and heating, water and hot water in the apartments as well as one meal per day per two residents.

MHA does not receive any incentives from suppliers for services paid for through the service charge.

**Utilities Charge** Heating, water and hot water are included in the service charge.

**Wellbeing Charge** **£444.21 per month** (per apartment)

Note: Leaseholders are charged on a calendar monthly basis in line with the terms of the lease. For illustration purposes, the weekly wellbeing charge is:

**£102.23 per week** (per apartment)

This is payable in advance for the month ahead.

This includes 24 hour staffing on site, help in an emergency and the co-ordination of an activities and events programme.

*Ongoing charges payable to MHA continue on the **next page**.*

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### Ongoing charges payable to MHA (continued)

#### Emergency Response

24-hour Emergency Response is provided through the **Wellbeing Charge**.

This is not a care service but will provide support during an emergency, and may involve co-ordinating external agencies.

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.

#### Ground rent

**1-bed – £300 per annum** (per apartment)  
**2-bed – £400 per annum** (per apartment)

The first Review Date is 1<sup>st</sup> April 2018 which is then reviewed on this date every fifth year thereafter.

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### Care costs

**Personal care**     **£20.00 per hour**

This is chargeable in 15 minute intervals.

This covers the cost of any personal care that is individual to you and provided by MHA. For example: washing, dressing, medication assistance, etc.

*Note: This will depend on staffing resources at the time. We will endeavour to meet your needs whenever possible.*

**Nursing care**     MHA does not provide nursing care at Hatherlow House.

### Additional MHA Services

**Maintenance service**     **£23.00 per hour**

This is chargeable in 15 minute intervals.

This includes maintenance carried out within a residents own property. For example: small jobs and repairs.

**Domestic service**     **£19.40 per hour**

This is chargeable in 15 minute intervals.

This includes any domestic service that is individual to you and provided by MHA. For example: housework such as vacuuming, dusting, cleaning kitchens/bathrooms etc.

**Escort service**     **£20.00 per hour**

This is chargeable in 15 minute intervals.

For example: for a member of staff to accompany you to appointments, to go shopping, etc., if required.

**Guest room**     **£27.00 per night**

A guest room is available.

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### Ongoing costs to external bodies

**Utility bills** It is the Residents responsibility to arrange contracts with a utility supplier for electricity.

**Council tax** It is the Residents responsibility to arrange payment of Council Tax.

**TV licence** **£159.00 annual charge**

It is the Residents responsibility to buy their own TV licence.

A free licence is available by application to those over 75, who are also in receipt of pension credit.

If you are blind (severely sight impaired), you are eligible to apply for a 50% concession.

For further information, please visit [www.tvlicensing.co.uk](http://www.tvlicensing.co.uk).

**Internet & Telephone provider**

Free Wi-Fi is provided in communal areas only.

Residents are responsible for arranging their own broadband supplier and telephone lines.

### Insurance arrangements

**Responsibility of the operator (MHA)** Buildings, Public Liability and Employers' Liability are all 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 more information.

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### Understanding the Contingency Fund

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

The contingency fund is built up from deferred fees that are paid when properties are resold and the amount payable is determined by the terms of the lease. The fund is built up to cover major works, such as roof replacement, lift replacement, doors/windows etc. and MHA maintain detailed stock condition information on a scheme by scheme basis to ensure that sufficient funds are available when work is required.

Each year, MHA publish the balance of the contingency fund within the scheme's service charge accounts and this will advise leaseholders and potential customers on the balance and what work has been completed in the financial year that the accounts cover.

There is no financial liability on leaseholders to cover shortfalls in the contingency fund (as per the terms of the lease) and MHA would undertake required works if there were insufficient funds, collecting any shortfall as properties sell.

In order to protect contingency fund monies for leaseholders these are held in individual scheme bank accounts, and this information is provided within the annual service charge accounts.

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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.

The leasehold properties at Hatherlow House are **Non-Guaranteed Buy Backs**, therefore, MHA has an option to buy-back if they wish.

If MHA chooses to exercise this option, they will buy back the property at 95% of the open market value as determined by an independent valuer.

The information in this document is correct as of **1<sup>st</sup> June 2021**.

The information in this document does not in any way form part of a contract or warranty.

For further information on any items detailed in this Key Facts document, please contact the **Housing with Care Manager** or consult the **Residents Handbook**.

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.