

Adlington House, Otley

Key Facts for Leaseholders (2020/2021)



Property Details

Name of operator	MHA - Methodist Homes
Name of scheme	ADLINGTON HOUSE Otley, West Yorkshire, LS21 1FQ
Description	48 Apartments: 14 x 1-bed 32 x 2-bed 2 x 3-bed On 3 floors (two lifts), all fitted with: electric central heating, kitchen with hob, oven, and refrigerator/freezer.
Status of apartments	The development was purposely designed and built in 2015/16, and successfully opened on programme: 27 October 2016. The majority of the apartments were purchased from plan prior to scheme build completion. Pre-Owned
Occupancy	Based on the number of bedrooms in each apartment in the development, referred to above, the total number of residents that can be accommodated is 84.
Tenure	Leasehold. 125 years from 1st January 2016
Care provider	Residents can choose a care agency of their choice. 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.

*For further information please see the **Residents' Handbook***

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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 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

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.

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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 process has been fully 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

If your lease allows sub-letting, you will still need MHA's permission to sub-let and the property can only be sub-let to an 'approved occupier'.

In the event of sub-letting the Contingency Fund Contribution must be paid when the new resident moves in and MHA charges the owner for the legal fees associated with the sub-let.

The owner stays responsible for the Contingency Fund Contribution, the Service charge and the Wellbeing charge

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Cost of moving in to the property

Asking price	This is set by the private vendor.
Deposit	The deposit on the Apartment will be detailed in the sales information and the terms & conditions of the ensuing lease.
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	<p>The service charge is payable in advance for the month ahead.</p> <p>This includes communal cleaning, maintenance and repairs, 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. Catering provision, gardening services and accountancy fee.</p> <p>MHA does not receive any incentives from suppliers for services paid for through the service charge.</p>	<p>1-beds: £101.66 per week 2-beds: £102.57 per week 3-beds: £103.46 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>Water charges are included in the service charge.</p> <p>Personal water charges are included in the above service charges. Whilst the service charge is split on an equal basis across apartments on the scheme, personal water is based on the size of the apartment.</p>	
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>	<p>£65.69 per week (per apartment)</p> <p>(Note: Leaseholders are charged on a calendar monthly basis in line with the terms of the lease)</p>

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Ongoing charges payable to MHA

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>
Ground Rent	<p>Ground rent is paid per apartment and is reviewed every year.</p> <p>1 bedroom - £1,077.57 per annum 2 bedroom - £1,616.37 per annum 3 bedroom - £2,155.16 per annum</p>	

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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>£16.97 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***

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Additional MHA Services

Maintenance service	Maintenance carried out within a residents own property. For example: small jobs and repairs	£16.97 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.)	£15.00 per hour (Note: This is chargeable 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

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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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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Understanding the Contingency Fund and the Sinking Fund

What are these funds? A contribution to the Contingency Fund and/or Sinking Fund is payable on sale or a transfer of ownership. The contribution is a percentage of the 'open market value' at the point of sale/ transfer, for each year or part-year of ownership.

The situation relating to the Contingency Fund and/or Sinking Fund depends entirely on the terms & conditions of the lease. Some leases use a Contingency Fund arrangement and some use a Sinking Fund arrangement.

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.

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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.

*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.