



## BOUGHTON HALL KEY FACTS

PROPERTY DETAILS		
Name of relevant bodies:	<p><i>Community Operator:</i> Enterprise Retirement Living Limited (“ERL”)</p> <p><i>Landlord:</i> ERL (Chester) Limited (“ERLCL”)</p> <p><i>Management company:</i> Boughton Hall Management Limited (“BHML”)</p>	
Name of community and when established	Boughton Hall, established in 2010; completed in 2015	
Description of property	<i>Type:</i> [ ] Bedroom Apartment	
	<i>Building:</i> [ ]	
	<i>Plot no:</i> [ ]	
	<i>Postal no:</i> [ ]	
	<i>Floor:</i> [ ]	
	<i>Council Tax band:</i> [ ]	
	For current Council Tax payable, see “Unavoidable Ongoing Living Costs Payable to External Providers” below.	
Status of property	New-build <input type="checkbox"/>	
	Newly converted <input type="checkbox"/>	
	Pre-owned <input checked="" type="checkbox"/>	
	Year of construction or conversion: [ ]	
Occupancy	Single or dual occupancy.	
Tenure	Leasehold: 125 years from 01/01/2009.	
Sub-letting	Sub-letting is not permitted.	
CHARGES PAYABLE WHEN LEAVING OR SELLING THE PROPERTY		
Event Fee: Deferred development payment	<i>Length of Occupancy</i>	<i>Percentage of Sale Price</i>
	Up to 1 year	3%
	1 – 2 years	4%
	Over 2 years	5%
	For further information, please see the “Event Fees – Disclosure Document”.	

<b>Event Fee:</b> Sales administration fee <sup>1</sup>	1.8% of selling price, including VAT at 20%.
Other charges	Vendors are liable for all ongoing charges until a property is resold, any arrears of charges, the costs of any repairs to redecoration required under the lease prior to resale, and legal and removals costs.

### **COST OF MOVING INTO THE PROPERTY**

Purchase price	£ [                    ]. A deposit (usually 10%) is payable to the vendors on exchange of contracts.
Lease engrossment fee	£144, including VAT at 20%. <sup>2</sup>
Legal costs	Purchasers pay their own legal costs, which can vary; it is advisable to obtain comparative quotes.
Stamp Duty Land Tax (SDLT)	If the property is subject to SDLT, the payment of this is the purchasers' responsibility.
Removal costs	Purchasers' choice at own expense, but local company Prestige Removals can provide this service at a competitive rate. Please ask the ERL Sales Team for details.

### **ONGOING UNAVOIDABLE CHARGES PAYABLE TO ERL OR ERLCL WHILE LIVING IN THE RETIREMENT COMMUNITY**

Service charge (payable to ERL) <sup>3</sup>	1-bedroom property: £503.75 pm; £6,045.00 pa.
	2-bedroom property: £571.00 pm; £6,852.00 pa.
	See also "Service Charge Budget 2020" and The Service Charge document.
Ground rent (payable to ERLCL) <sup>3</sup>	Currently £350 pa, doubling every 25 years from the commencement of the lease (01/01/2009).
Overnight "on call" support	The 24-hour staff is included in the service charge.

### **CARE COSTS**

Care arrangements sourced from external providers	Domiciliary, personal or nursing care is not included in the service charge, but can be arranged via an external agency of the individual's choice.
	Boughton Hall has developed links with two care providers – Home Instead Senior Care and Jane Lewis Health and Social Care – whose services are given in property owners' homes. Their hourly rates, which are reviewed annually, start at £22.95 and £15.72 respectively. Full details of their charges, including sleeping/waking nights, Bank Holiday cover, 24-hour care, and nursing services (if available) are available on request.

	<p>Any domiciliary, personal or nursing care costs are paid direct by the individual to the care provider. If a private "Healthcare Needs Assessment" is required, instead of or as well as the free NHS assessment, the cost of this will be payable by the individual direct to the GP.</p>
	<p>Neither ERL, ERLCL or BHML, nor any company or person associated with them or Boughton Hall, receives any incentive or commission from the above, or any other, care service providers.</p>

## LIVING COSTS PAYABLE TO EXTERNAL PROVIDERS

Utility bills (unavoidable)	<p>All utility costs are payable directly to the relevant utility company. Charges will vary according to usage, but the following are indicative costs:</p> <ul style="list-style-type: none"> <li>• Electricity (includes heating/hot water) – £60/£100 pm</li> <li>• Water – £40/£50 pm</li> </ul>
Council tax (unavoidable)	<p>The properties at Boughton Hall fall into different Council Tax bands (see "Property Details" above).The current charges are:</p> <ul style="list-style-type: none"> <li>• Band D – £1,500 pa</li> <li>• Band E – £1,900 pa</li> <li>• Band F – £2,200 pa</li> </ul> <p>There is a 25% discount for single occupancy.</p> <p>Council Tax is payable directly to Chester West and Chester Council.</p>
TV, telephone and internet (owners' choice)	<p>Communal aerials and satellite dishes are provided for each building, but the actual TV, telephone and internet services in individual properties are not included in the service charge. These are the responsibility of property owners and are payable directly to the service provider.</p> <p>Free wi-fi is available in the common areas.</p>
TV Licence (unavoidable if TV service above required)	<p>All property owners are responsible for obtaining their own TV licence. From 01/04/18, a colour TV licence costs £150.50, but is free for the over-75s<sup>4</sup>, but it must be applied for. (For owners who are 74, a short-term licence can be obtained for cover until age 75 is reached. Owners who are blind or sight-impaired can claim a 50% discount.)</p>

## INSURANCE ARRANGEMENTS

Responsibility of the community operator	<p>Buildings insurance, public liability insurance and employers' liability insurance is arranged by BHML and included in the service charge.</p>
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Responsibility of property owners	All property owners are responsible for their own home contents insurance and any other insurances they feel they require.
<b>FUTURE CAPITAL EXPENDITURE</b>	
Fund for future maintenance (Reserve Fund)	The service charge includes a contribution towards a reserve fund for buildings maintenance costs, identified via regular stock condition surveys. If repair costs exceeded the funds available, owners would be consulted on funding options, which could include requesting additional contributions. The balance of the reserve fund at 30/09/19 (the date last reported on by the managing agents) was £165,722.
<b>RESTRICTIONS ON SELLING THE PROPERTY</b>	
Sale option	ERLCL has an option to the right of first refusal on any resale of the properties.
Restrictions	At least one new resident must be over 55.

*Last updated: January 2020*

Charges are correct at the date shown, but may change annually or at other intervals over the period of residence.

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 a retirement community.

<sup>1</sup> The Sales Administration Fee is called the Marketing Assistance Fee in the Lease.

<sup>2</sup> Please note that this was the fee charged by ERL's solicitors on the first sales of the properties. Solicitors acting for vendors of pre-owned properties may charge a different amount.

<sup>3</sup> Appropriate arrangements will be made between the vendors and purchasers of pre-owned properties to account for any ground rent and service charges already paid by the vendors. If any ground rent and/or service charges are due to be paid to ERLCL and BHML, these will be payable from the date of completion to the end of the next half-year date.

<sup>4</sup> With effect from June 2020, free TV licences will only be available to the over-75s who receive Pension Credit.

### **Enterprise Retirement Living Limited (Community Operator)**

Registered in England & Wales No: 06525067

### **ERL (Chester) Limited (Landlord)**

Registered in England & Wales No: 06525084

### **Boughton Hall Management Limited (Management Company)**

Registered in England & Wales No: 06728089

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