

MOUNT BATTENHALL KEY FACTS

PROPERTY DETAILS		
Name of relevant bodies:	<p><i>Community Operator:</i> Enterprise Retirement Living Limited (“ERL”)</p> <p><i>Landlord:</i> ERL (Worcester) Limited (“ERLWL”)</p> <p><i>Management company:</i> Mount Battenhall Management Company Limited (“MBMCL”)</p>	
Name of community and when established	Mount Battenhall, established in 2020; due for completion in 2021.	
Description of property	<i>Type:</i>	[] Bedroom [Property type]
	<i>Building:</i>	[]
	<i>Plot no:</i>	[]
	<i>Postal no:</i>	[]
	<i>Floor:</i>	[]
	<i>Council Tax band:</i>	TBA ¹
	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 type="checkbox"/>
	Year of construction or conversion: [2020/2021].	
Occupancy	Single or dual occupancy.	
Tenure	Leasehold: 250 years from 01/07/2020.	
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	6%
	1 – 2 years	8%
	2 – 3 years	10%
	3 – 4 years	12%
	4 – 5 years	14%
	5 – 6 years and over	16%

¹ Council Tax bands have yet to be set by the Valuation Office Agency. These will be advised as soon as they are known.

	For further information, please see the “Event Fees – Disclosure Document”.
Estate Agency charges	The costs of the estate agency service offered by ERL are covered by the Deferred Development Payment. Vendors are free to use external agents, but will be liable for their charges.
Other charges	Vendors are liable for all ongoing charges until a property is resold, any arrears of charges, the costs of any repairs or redecoration required under the lease prior to resale, and legal and removals costs.

COST OF MOVING INTO THE PROPERTY

Purchase price	£ [].
Reservation fee	The initial fee for reserving a property is £1,000. ² (Not applicable to resales.)
Lease engrossment fee	£210, including VAT at 20%.
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.

ONGOING UNAVOIDABLE CHARGES PAYABLE TO ERL OR ERLWL WHILE LIVING IN THE RETIREMENT COMMUNITY

Monthly fee (payable to ERWL)	1-bedroom property: £666.25 pm; £7,995 pa.
	2-bedroom property: £707.92 pm; £8,495 pa.
	See also “The Monthly Fee” document.
Ground rent	Peppercorn; not collected, so no ground rent payable.
“On call” support (day or night)	The 24-hour staffing is included in the monthly fee.
Parking	Whilst unallocated parking is available on a first-come, first-served basis free of charge, a limited number of spaces are available to Owners and Occupiers under an open-ended licence at an annual charge of £250 per space (limited to one space per property).

CARE COSTS

Care arrangements sourced from external providers	Domiciliary, personal or nursing care is not included in the monthly fee, but can be arranged via an external agency of the individual’s choice.
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² If the reservation proceeds to completion, this is deductible from the 10% exchange deposit. Please see the Reservation Agreement Terms for details of reservation cancellation rights and the amount of the reservation fee which will be refunded in this event.

	The Management Team at Mount Battenhall will hold up-to-date details of reputable and appropriately qualified and Care Quality Commission registered local care companies which can be supplied on request. However, Owners and Occupiers are at liberty to source alternative care providers if they wish.
	Care costs vary from provider to provider, and depending on the type of care required. Typically, however, care visits can cost between £20 and £30 per hour on weekdays, more at weekends and on bank holidays. Overnight, 24-hour care, respite and live-in services are all available and care companies will quote for these, and their basic services, based on individual requirements.
	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.
	Neither ERL, ERLWL or MBMCL, nor any company or person associated with them or Mount Battenhall, receives any incentive or commission from the above, or any other, care service providers.

ONGOING 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:³</p> <ul style="list-style-type: none"> • Electricity – £463.00 • Heating⁴ • Gas – £450.00⁵ • Water – £393.00
Council tax (unavoidable)	The properties at Mount Battenhall are likely to fall into different Council Tax bands (see "Property Details" above). When this property has been banded for Council Tax purposes, the rates will be advised.
	There is a 25% discount for single occupancy.
	Council Tax is payable directly to Worcester City Council.
TV, telephone and internet (Owners' or Occupiers' choice)	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 monthly fee. These are the responsibility of property Owners or Occupiers and are payable directly to the service provider.
	Free wi-fi is available in the common areas.

³ Until some of the properties have been occupied for a while, it is difficult to estimate average utility costs.

⁴ Heating is provided via a District Heating System and will be invoiced by ERLWL to all properties except The Gatehouse and Gardener's Cottage, which has individual gas boilers.

⁵ The cost of the annual gas boiler service is included in the service charge.

TV Licence (unavoidable if TV service above required)	All property Owners or Occupiers are responsible for obtaining their own TV licence. From 01/04/20, a colour TV licence costs £157.50, but is free for the over-75s who receive Pension Credit, but it must be applied for. Owners and Occupiers who are blind or sight-impaired can claim a 50% discount.
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INSURANCE ARRANGEMENTS

Responsibility of the community operator	Buildings insurance, public liability insurance and employers' liability insurance is arranged by MBMCL and included in the monthly fee.
Responsibility of property Owners or Occupiers	All property Owners or Occupiers are responsible for their own home contents insurance and any other insurances they feel they require.

FUTURE CAPITAL EXPENDITURE

Fund for future maintenance	There is no separate "Fund for future maintenance" as such. The future maintenance of Mount Battenhall is the responsibility of ERLWL and Owners contribute to the costs only through the Deferred Development Payment payable on leaving or selling the property.
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RESTRICTIONS ON SELLING THE PROPERTY

Sale option	ERLWL has an option to the right of first refusal on any resale of the properties.
Restrictions	At least one new resident must be 60 years old or over.

Last updated: March 2021

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.

Enterprise Retirement Living Limited (Community Operator)

Registered in England & Wales No: 06525067

ERL (Worcester) Limited (Landlord)

Registered in England & Wales No: 10780048

Mount Battenhall Management Company Limited (Management Company)

Registered in England & Wales No: 12392549

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