



THE WOODLANDS

HEATON MERSEY

Key Facts

1. Property Details

Landlord	Gladman Retirement Living Ltd
Manager	Adlington Management Services Ltd (AMS)
Address	The Woodlands, Woodlands Road, Heaton Mersey, Stockport, SK4 3BN
Property Type	63 Apartments: <ul style="list-style-type: none"> 20 x one bedroom, 35 x two bedrooms, 8 x three bedrooms Over 4 floors. Two lifts available NHBC 10-year guarantee applies from the first apartment sale
Status of units	New
Occupancy	<ul style="list-style-type: none"> 1 and 2 bedrooms: one or two people 3 bedrooms: up to three people
Tenure	Leasehold 250 years from 1st January 2022
Care provider	Right at Home Stockport & Didsbury, Stockport Business & Innovation Centre, Broadstone Mill SK5 7DL. Residents are free to choose other agencies.
Catering provider	ABM Essence

2. Cost of moving into the property

Asking price	Varies by individual apartment size and location (see price list) <ul style="list-style-type: none"> 1 bedroom: £139,950 to £292,500 2 bedrooms: £299,750 to £559,950 3 bedrooms: £439,950 to £625,950
Reservation fee	£1,500 payable on reservation
Other costs	There is no charge for the health needs assessment. Buyers are responsible for their own legal and removals costs and for Stamp Duty Land Tax.

3. Discretionary charges payable to Adlington or other service providers

Domiciliary (personal) care	(Right at Home) charges: <ul style="list-style-type: none"> From £22 – Monday to Friday before 8pm From £24 – Monday to Friday after 8pm From £24 – Weekends all times From £24 – night calls
Nursing care	Nursing care is not provided.
Restaurant charges	ABM Essence charges: £4.25 for 2 courses and £5.50 for 3 courses
Maintenance service	Small jobs and repairs in apartments arranged through AMS: £15.00 per hour . Homeowners can use other maintenance providers.
Cleaning service	Apartment cleaning arranged through AMS: £15.00 per hour . Homeowners can use other cleaning providers
Guest Suite	Available to the guests of homeowners. Includes breakfast: <ul style="list-style-type: none"> 1 person: £40 per night 2 – 4 persons: £50 per night

4. Charges when selling the property

Communal Facilities Fee	<p>The Communal Facilities Fee (CFF) at The Woodlands is a fee payable upon the sale of your home or if there is a change of occupier so you can enjoy the facilities now but pay for them later.</p> <p>This fee ensures that homeowners can enjoy the use of our first-class communal facilities, today and in the future. It contributes towards:</p> <ul style="list-style-type: none"> • The construction and provision of the communal facilities across the retirement community • Regular replacement and refurbishment of all these communal facilities, the exterior of the building, restaurant kitchen equipment and facilities, lifts, roof, private homeowner parking and also your patio or balcony structure <p>How the fee is calculated</p> <p>You do not have to pay anything until you choose to sell your apartment (or there is a change of occupier). The fee is 3% per annum, capped at 6 years (maximum 18%) of the achieved market price (or an agreed market valuation of the property), per year or part year of occupation.</p> <p>For example:</p> <ul style="list-style-type: none"> • If a property has been owned for 4 years and 7 months and sold for £300,000 the fee payable is £45,000 • Or, if a property has been owned for 10 years and 3 months and sold for £300,000, the fee payable is £54,000 <p>Should you wish to pay for the CFF on your apartment at point of purchase, you are able to do so at a reduced rate of 15% of the price you pay for your apartment. This is only available to the first purchaser of any apartment.</p>
Administration fee	Minimum fee £360 (including VAT). Covers the landlord's costs in checking the eligibility of the purchaser and facilitating the transfer of the lease.
Ongoing charges	The Service and Well-being Charge remains payable until a property is sold.
Repairs or redecoration	Properties must be redecorated at least every 7 years. Vendors may need to undertake works at their own cost to assist a sale.
Other charges	Vendors will need to pay their own removal and legal fees.

5. Ongoing charges payable to Adlington while living in the community

Service and Well-being Charge	<ul style="list-style-type: none"> • 1 bedroom: £158 per week* • 2 bedrooms: £171 per week* • 3 bedrooms: £184 per week* <p>The Service and Well-being Charge is reviewed annually. Should there be any future increase, it will be capped in line with the Retail Price Index (RPI) or the actual increase in cost, whichever is the lower figure, for the duration of the ownership of your apartment. So you can be secure in the knowledge there will be no large, unexpected price increases.</p> <p>*Approximate price.</p>
24/7 'On call' support	Included in the Service and Well-being Charge

6. Ongoing charges payable to third parties

Electricity	Homeowners arrange their own electricity supply contract.
Council tax	<p>Council tax bands and 2022/23 charges:</p> <ul style="list-style-type: none"> • 1 bedroom: Band C - £1,904.35 • 2 bedrooms: Band D - £2,142.40 / Band E - £2,618.48 / Band F - £3,094.57 • 3 bedrooms: Band E - £2,618.48 / Band F - £3,094.57
TV licence	Homeowners pay for their own licences and claim any discounts. See www.tvlicensing.co.uk
Internet and telephone	Wi-Fi is available in the communal areas only. Homeowners arrange their own broadband and telephone service contracts.
Satellite, cable TV	Communal satellite dish. Homeowners arrange their own contracts.

7. Insurance arrangements

Responsibility of the operator	Communal Buildings Insurance, Public Liability and Employer's liability are included within the Service and Well-being Charge.
Responsibility of the owner	Home contents insurance is recommended. Homeowners choose their own provider.

8. Other information

Subletting	Subletting is not permitted. Refer to the lease.
Restrictions on selling the property	At least one occupier in each apartment must be 55 or over. Properties can be purchased by younger people on behalf of qualifying occupiers. Homeowners must undergo a health assessment prior to purchase. Homeowners are entirely responsible for managing property resales.

Please note: Charges stated 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.

Information for homeowners - the Service and Well-being Charge

The following questions and answers are intended to help explain how Adlington Management Services Ltd (AMS) manage the Service and Well-being Charge.

What services does the charge cover?

The budget headings for the Service and Well-being Charge are:

- **Well-being staff costs and professional catering:** Well-being Duty Managers who provide cover 24 hours a day, 365 days a year and the catering service
- **Staff Costs:** General Manager, Maintenance Person and team uniforms
- **Management Fees:** Managing the development and services on behalf of the landlord (administration, human resources, legal, procurement, etc)
- **External professional fees:** Accountancy costs for reviewing the accounts
- **Risk Assessments:** Staff health and safety training and ensuring that all risk assessments are compliant
- **Office Costs:** Stationery, fibre-optic broadband and IT security
- **Window Cleaning:** External windows and gutters and internal windows in the communal areas only
- **Waste Management:** Removing waste and controlling pests
- **Internal Cleaning:** Communal areas only, including the housekeepers and cleaning products
- **External Landscaping:** Grounds maintenance services
- **Maintenance Contracts:** Maintaining and servicing external doors, the emergency call system, all fire safety equipment and lightning protection
- **Lift Maintenance Contract:** Maintenance, including parts and servicing
- **Internal repairs and maintenance:** Day to day work in the communal areas only
- **Lifestyle Events:** Fund to facilitate activities of the homeowners choosing
- **Insurance:** Covers the building, communal contents and the staff working in it
- **Water and sewerage costs:** Providing these services for individual apartments as well as for the communal areas
- **Communal electricity:** The electricity used in all of the communal areas

Is the Service and Well-being Charge 'fixed' or 'variable'?

The Service and Well-being Charge is reviewed annually. Should there be any future increase, it will be capped in line with the Retail Price Index (RPI) or the actual increase in cost, whichever is the lower figure, for the duration of the ownership of your apartment. So you can be secure in the knowledge there will be no large, unexpected price increases.

When does the Service and Well-being Charge change and what advance notice is provided?

The charge changes on 1 April every year. Homeowners receive at least one month's notice of the new charge.

How would any significant failure to provide a service be managed?

Any service interruptions would be managed to minimise disruption. If alternative arrangements could not be made, a refund would be due at the end of the year.

Is any of the Service and Well-being Charge payable before moving into the property?

The Service and Well-being Charge is payable in advance for the month ahead.

Is the Service and Well-being Charge held in trust?

The Service and Well-being Charge funds are held in a separate trust fund account for the benefit of homeowners and cannot be used for any other purposes.

Is the latest itemised charge budget and/or set of accounts available?

The latest Service and Well-being Charge budget is detailed on page 6.

When are homeowners informed about the Service and Well-being Charge budget and/or accounts?

In January, homeowners receive a proposed annual budget from 1 April. In September, they receive independent accounts for the year to 31 March.

Can homeowners influence the charge and the services offered?

Homeowners and the Residents' Association (if there is one) are consulted on budgets and the long-term maintenance programme, in a budget review meeting in January each year. Any commitments or budget changes made are confirmed in writing.

How is any annual surplus or deficit on the charge account managed?

The accounts are independently reviewed annually and will be available to be reviewed by homeowners by 30th Sept. Any significant variations between the current level of expenditure and the budget for the year are explained and discussed with homeowners. Any surplus will be refunded to homeowners and any deficit will be recharged to homeowners.

Service and Well-being Charge - Budget 1st January 2022 to March 2023

Income	£
Service and Well-being Charge	510,891
Guest Suite Income	1,500

Total Income	512,391
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Expenditure	
Service and Well-being team costs and professional catering	250,896
Staff costs	55,704
Management fees	40,950
External accountancy fees	1,000
Risk assessments	2,640
Office costs	11,270
Window cleaning	5,916
Waste management	5,164
Internal cleaning - communal areas	20,956
External landscaping	6,844
Maintenance contracts	24,217
Lift Maintenance contract	3,960
Internal repairs and maintenance	6,748
Building & communal contents Insurance	17,276
Water and sewerage costs- including apartments	12,000
Communal electricity	78,500
Lifestyle events	5,000
COVID equipment	2,650
Sundries	300
Bank charges	400

Total Expenditure	551,891
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Number of Apartments	63
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	1 Bedroom	2 Bedroom	3 Bedroom
Percentage	1.48679	1.61153	1.7326
Approximate Weekly Charge	£157.37	£170.57	£183.39
Monthly	£681.93	£739.14	£794.67

Information for homeowners - the Communal Facilities Fee

The following questions and answers are intended to help explain how the Communal Facilities Fee is managed.

What is the Communal Facilities Fee?

The Communal Facilities Fee (CFF) at The Woodlands is a fee payable upon the sale of your home or if there is a change of occupier so you can enjoy the facilities now but pay for them later.

This fee ensures that homeowners can enjoy the use of our first-class communal facilities, today and in the future.

Moreover, you can relax, safe in the knowledge that there will always be sufficient funds available to undertake any works required to The Woodlands communal areas, including the exterior of the building, with no unexpected extra charges to the homeowners.

Adlington will use these funds to refurbish or replace all communal parts of the development to the highest standards whenever required. Not only will this ensure it is a quality place to live, but it will also protect the resale value of your property, ensuring that when an apartment is sold, you will get the best sales value for it.

All homeowners are responsible for the repair and maintenance of their own apartment.

What does the fee contribute to?

It contributes towards:

- The construction and provision of the communal facilities across the retirement community, including the restaurant, homeowners' lounge and coffee lounge, hair salon, therapy suite, guest suite and activities studio

- Regular replacement and refurbishment of all these communal facilities, the exterior of the building, restaurant kitchen equipment and facilities, lifts, roof, private homeowner parking and also your patio or balcony structure

How is the fee calculated?

You do not have to pay anything until you choose to sell your apartment (or there is a change of occupier). The fee is 3% per annum, capped at 6 years (maximum 18%) of the achieved market price (or an agreed market valuation of the property) per year or part year of occupation.

For example:

- If a property has been owned for 4 years and 7 months and sold for £300,000 the fee payable is £45,000
- Or, if a property has been owned for 10 years and 3 months and sold for £300,000, the fee payable is £54,000

Can the fee be paid at the point of purchase?

Should you wish to pay for the CFF on your apartment at point of purchase, you are able to do so at a reduced rate of 15% of the price you pay for your apartment. This is only available to the first purchaser of any apartment.



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Adlington Retirement Living is the trading name for Gladman Retirement Living Ltd, Adlington House, Alexandria Way, Congleton, Cheshire CW12 1LB. Registered in England and Wales No. 05107546.

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— RETIREMENT LIVING —



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