

Property:	
Seller:	

These enquiries are asked on behalf of buyers. The Seller should only respond to these enquiries if they are the Management Company, the Managing Agent or the Residents' Association or are representing any of them.

TERM	DEFINITION
Estate Rentcharge	The amount payable under the terms of the Transfer as is permitted under clause 2(4) of the Rentcharges Act 1977.
Managed Area	The properties including the building containing the Property, together with any land, managed by or on behalf of the Management Company under the terms of the Transfer. Managed Areas are sometimes also called common parts.
Management Company	A management company referred to in the Transfer, to provide services and administer the terms of the Transfer either directly or through Managing Agents.
Managing Agent	A person or organisation which acts on behalf of the Management Company [within their terms of reference, subject to any legal restrictions].
Property	The property known by the above address, including any land and outbuildings transferred to the Seller.
Owners	The owners of properties in the Managed Area.
Rentcharge Owner	The person to whom the Estate Rentcharge is payable under the terms of the Transfer.
Reserve Fund	A fund collected from the Owners which allows the build-up of monies to pay for repairs and the replacement of major items (such as electric entrance gates) or to equalise cyclical expenditure (such as external decoration), avoiding excessive peaks in the Service Charge. Reference to Reserve Fund includes any sinking fund or replacement fund.
Residents' Association	A group of some or all of the Owners with or without a formal constitution or corporate status, or a recognised residents association which is 'recognised' by law and with a formal constitution.
Service Charge	The amount payable by an Owner as a contribution to the costs of services, repairs, maintenance, insurance, improvements or costs of management etc. as set out in the Transfer. The amount payable may vary according to the costs incurred or to be incurred.
Transfer	The deed under which the covenants and restrictions were created for the management and operation of the Management Company and Managed Areas and, in the case of subsequent ownership, the Deed of Covenant binding the Owner as if they were party to the Transfer.

Please complete the information requested. It is important that the incoming Owner is fully aware of their obligations so the information given must be as accurate as possible. If there is insufficient space, continue on a separate sheet.

SECTION 1: CONTACT DETAILS		<i>Complete the details for the relevant parties or cross through if not applicable. If there are more parties involved, provide details on a separate sheet.</i>									
1.1	Management Company	1.2	Managing Agent								
	Name Address Telephone Email	Name Address Telephone Email									
1.3	Rent Charge Owner	1.4	Lawyer representing one of the above								
	Name Address Telephone Email	Name Address Telephone Email Appointed by:									
1.5	<p>Who accepts service of the Notice of Transfer & Charge?</p> <p><i>Tick the box beside each party and state the total fee including VAT for notice of assignment and charge.</i></p> <table> <tr> <td><input type="checkbox"/> Management Company</td> <td>£ _____</td> </tr> <tr> <td><input type="checkbox"/> Managing Agent</td> <td>£ _____</td> </tr> <tr> <td><input type="checkbox"/> Rent Charge Owner</td> <td>£ _____</td> </tr> <tr> <td><input type="checkbox"/> Lawyer</td> <td>£ _____</td> </tr> </table>			<input type="checkbox"/> Management Company	£ _____	<input type="checkbox"/> Managing Agent	£ _____	<input type="checkbox"/> Rent Charge Owner	£ _____	<input type="checkbox"/> Lawyer	£ _____
<input type="checkbox"/> Management Company	£ _____										
<input type="checkbox"/> Managing Agent	£ _____										
<input type="checkbox"/> Rent Charge Owner	£ _____										
<input type="checkbox"/> Lawyer	£ _____										

If other, provide contact details for service:

Name

Address

Telephone

1.6 Who collects the Estate Rentcharge?

Rentcharge Owner Management Company Managing Agent N/A

1.7 Who collects the Service Charges?

Management Company Managing Agent N/A

1.8 Who deals with the day to day maintenance of the Managed Area?

Management Company Managing Agent Other N/A

1.9 Who collects the insurance premiums for the Managed Areas ?

Management Company Managing Agent Other N/A

1.10 Who organises and administers the insurance?

Management Company Managing Agent Other N/A

SECTION 2: TRANSFER & REGISTRATION

2.1 Is a Deed of Covenant required? Yes No Not Known

2.1.1 If Yes, confirm the costs applicable to the Deed including £ _____ VAT _____

2.2 Are you aware of consent having been given to any alterations or additions to the Property? Yes No

22.1 If Yes, provide details and copies of any consent:

Figure 1. The relationship between the number of species and the area of forest cover in each state.

2.3 Is the incoming Owner required to take a share in, or become a member of, the Management Company? Yes No

2.4.1 If Yes, provide details of the procedure and fees:

Figure 1. The relationship between the number of species and the area of forest cover in each state.

2.5 What is the procedure and cost for obtaining a certificate in accordance with a restriction in the Proprietorship Register at the Land Registry, if applicable?

Figure 1. The effect of the number of clusters on the classification accuracy of the proposed model.

SECTION 3: ESTATE RENTCHARGE

3.1 What is the annual Estate Rentcharge payable by this Property? £ _____

3.2 Is the Estate Rentcharge paid up-to-date?

Yes No

3.2.1 If No, supply details of the arrears:

100% of the time.

3.3 What period is covered by the last demand? From: _____ To: _____

SECTION 4: SERVICE CHARGE

4.1 How many properties contribute toward the maintenance of the Managed Area? _____

4.1.1 What is the current annual Service Charge for the Property? £ _____

4.2 Is the Service Charge paid up to date for the Property? Yes No

4.2.1 If No, supply details of the arrears: _____

4.3 Is any excess payment anticipated for the Property at the end of the financial year? Yes No

4.3.1 If Yes, provide details: _____

4.4 What period is covered by the last demand? From: _____ To: _____

4.5 In the last 12 months, has any inability to collect payments, from any party, affected (or is it likely to affect), the maintenance of the Managed Area? Yes No

4.5.1 If Yes, provide details: _____

4.6 Does a Reserve Fund apply to the Managed Area? Yes No

4.6.1 If Yes, confirm the amount collected from Owners of the Property, currently held in the Reserve Fund: £ _____

4.6.2 Is the amount expected to be sufficient to cover the known expenditure? Yes No

4.6.3 If No, supply details: _____

4.7 Confirm the date when the Managed Areas were last decorated, internally and externally. Internally Date: _____ To: _____
Externally Date: _____ To: _____

4.8 Within the next 2 years, are any works proposed to the Managed Areas anticipated to require an additional contribution greater than £250 from the Owner? completed but unpaid
 due
 anticipated
 N/A

4.8.1 If so, provide details of the works and the contribution anticipated from the Owner: _____

4.9 Is any increase in the Service Charge over 10% or £100, whichever is the greater, anticipated in the next 2 years? Yes No

4.9.1 If Yes, provide details:	<input type="text"/>		
4.10 Where you operate Service Charge consultation, are there any outstanding Service Charge consultation procedures?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
4.10.1 If Yes, provide details:	<input type="text"/>		
4.11 Are the Managed Areas known to be affected by Japanese knotweed or other invasive species?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
4.11.1 If Yes, provide details and a copy of any invasive species management plan in place.	<input type="text"/>		
4.12 Are there any: -transfer fees, -deferred service charges or -similar fees expressed as a percentage of the Property's value payable on an event such as resale or subletting?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
4.12.1 If Yes, provide details:	<input type="text"/>		

SECTION 5: INSURANCE

5.1 Are the insurance premium contributions paid up to date for the Managed Areas including the Property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.1.1 If No, provide details of the arrears:	<input type="text"/>	
5.2 What period is covered by the last demand?	From: _____ To: _____	
5.3 Has the premium been paid in full?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.3.1 If No, provide details:	<input type="text"/>	
5.4 Have any claims been made against the policy during the last 3 years?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.4.1 If Yes, provide details:	<input type="text"/>	
5.5 Are any claims anticipated?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.5.1 If Yes, provide details:	<input type="text"/>	
5.6 Is the insurance premium included in the service charge budget?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.7 If No, confirm the annual amount payable for the Property:	£_____	

SECTION 6: DISPUTES & ENFRANCHISEMENT

- 6.1 Are there any documented unresolved disputes with the Owners of any of the properties using the Managed Area? Yes No
- 6.1.1 If Yes, to the extent permitted by the Data Protection Act 1998, please supply details:
-
- 6.2 Are you aware of any breach of the terms of the Transfer of this Property? Yes No
- 6.2.1 If Yes, provide details:
-

SECTION 7: GENERAL

- 7.1 How many other properties are there entitled to use the Managed Area? _____
- 7.2 Are they all subject to Transfers with similar terms? Yes No Not Known
- 7.2.1 If No, provide details:
-

SECTION 8: REQUIRED DOCUMENTS

Please provide the following applicable documents:-

- 8.1 The last 3 years published Service Charge Accounts: Enclosed To follow N/A
- 8.2 Managed Areas insurance policy and schedule: Enclosed To follow N/A
- 8.3 Service charge estimate for the current year and details of the anticipated payments on account for the Property: Enclosed To follow N/A
- 8.4 Service charge estimate for the previous year for which accounts have not yet been prepared for the Property: Enclosed To follow N/A
- 8.5 Copies of any notices served on the Owners in respect of any proposed works or any works which have not yet been paid for: Enclosed To follow N/A
- 8.6 Any additional regulations or rules affecting the Property which are not contained in the Transfer: Enclosed To follow N/A
- 8.7 Any required Deed of Covenant Management Company's lawyer provides

 Enclosed To follow N/A
 Buyer's lawyer to draft
- 8.8 Any Certificate of Compliance required by a Restriction on the registered title: Enclosed To follow N/A
 Buyer's lawyer to draft

8.9	Copy of any permission to alter the Property which been issued:	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow	<input type="checkbox"/> N/A
8.10	Copy of any known notices served on the Owner and documentation arising from them:	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow	<input type="checkbox"/> N/A
8.11	Asbestos Survey for buildings forming part of the Managed Area built or converted before 2001:	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow	<input type="checkbox"/> N/A
8.12	Fire Risk Assessment for communal areas in buildings forming part of the Managed Area:	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow	<input type="checkbox"/> N/A
8.13	Memorandum and Articles of Association of the Management Company:	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow	<input type="checkbox"/> N/A
8.14	Minutes of the last AGM for the Management Company:	<input type="checkbox"/> Enclosed	<input type="checkbox"/> To follow	<input type="checkbox"/> N/A

Additional Information relevant to the Estate

Signed	Dated				
Print Name: Company:	<p><i>Please tick as applicable below, to confirm the capacity in which the answers are given.</i></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"><input type="checkbox"/> Managing Agent</td> <td style="width: 50%; text-align: center;"><input type="checkbox"/> Management Company</td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/> Rentcharge Owner</td> <td style="text-align: center;"><input type="checkbox"/> Residents' Association</td> </tr> </table>	<input type="checkbox"/> Managing Agent	<input type="checkbox"/> Management Company	<input type="checkbox"/> Rentcharge Owner	<input type="checkbox"/> Residents' Association
<input type="checkbox"/> Managing Agent	<input type="checkbox"/> Management Company				
<input type="checkbox"/> Rentcharge Owner	<input type="checkbox"/> Residents' Association				

Note

Additional enquiries. Raise only those specific additional enquiries required to clarify issues arising out of the documents submitted or which are relevant to Property or the management of the Managed Areas or which the buyer has expressly requested. Resist raising any general additional enquiries that can be established by the buyer's own enquiries, survey or personal inspection.

Disclaimer

Whilst care has been taken in the preparation of this form, no legal liability is accepted by the organisations which created the form. This disclaimer does not affect the legal responsibilities of the person, or organisation, completing this form to answer to the best of their knowledge and ability. If you have any queries you should discuss these with your conveyancer or solicitor.