



## Property Management Department Specialist Services



House & Son  
Lansdowne House  
Christchurch Road  
Bournemouth  
BH1 3JW

01202 315515 Option 4

Email: [management@houseandson.net](mailto:management@houseandson.net)



## Overview

House & Son have had an office in Lansdowne House since 1939 and we have witnessed considerable development of the Bournemouth and Poole areas over the years. At our Lansdowne office we specialise in East Cliff flat sales and professional residential letting. The Lansdowne office also has our Property Management Department and our Survey Department.

Our second office, in Winton, specialises in Sales and has a thriving student lettings Department. We also have an independent mortgage advice centre there.



## Why choose us?

House & Son currently manage over 100 blocks of flats varying in size between 4 and 96 units, several of which we have managed for over 15 years and our portfolio has increased through recommendation. We pride ourselves in providing professional advice and a friendly, personal service. We are a team of 7 full-time staff, consisting of two Property Managers, a fully qualified Accountant, two Administrators, a Department Secretary and a Company Secretary.

We offer a service tailored to each individual block's requirements. We carry out regular property inspections to keep on top of any potential problems which may occur and have an excellent team of contractors to deal with any repairs. We deal with issues effectively and regularly monitor progress, advising accordingly and always aim to provide an exceptional service to our clients.

# OUR SERVICES

## General

- We are regulated by the RICS (Royal Institution of Chartered Surveyors) and are therefore able to arrange insurance and handle claims.
- We comply with the code of Residential Management, as approved by the Department of Environment and the Royal Institution of Chartered Surveyors
- We have a specialist Accounts Department and all monies are kept in separate Bank Accounts.
- We have Professional Indemnity Insurance up to £1,200,000 for each and every claim.

## Legal

- Awareness of Legislation
- Ensuring compliance with Lease Covenants
- Organising all necessary Health & Safety Assessments, to comply with Legislation (an additional cost may be applicable)

## Communication

- Attending Directors/Residents meetings, when required
- Dealing with Residents enquiries
- Regular site visits
- Newsletters
- Landlord & Tenant Act Notices

## Accounting

- Preparation of Budgets
- Issuing Demands
- Making payments to Contractors
- Debt Collection
- Maintaining and reconciling individual Block Bank Accounts
- Liaising with Accountants in producing year-end Accounts

## Maintenance

- Raising 'Repair Orders' to Contractors and chasing through to completion of works
- Arranging Contracts as may be required (e.g. lift, fire alarm etc;)
- We have an extensive range of independent reliable Contractors with the appropriate Insurances, References and Risk Assessments in place
- Major works Contracts placed out of tender

## Insurance

- In some cases, we receive an annual fee upon renewal, for arranging the most appropriate Insurance Cover for your Block, through our Specialist Brokers
- Handling the claims process, including obtaining quotations, arranging repairs and all necessary liaisons with the Insurance Company/Loss Adjuster together with making payment to all Contractors at the conclusion of each claim.

## **Company Secretarial Services (Additional Charge)**

- Maintaining Company Books (manual and computerised)
- Convening and attending AGM
- Producing and distributing AGM Minutes
- Completing and filing Annual Returns with Companies House
- Registering Director changes with Companies House
- Ownership/Shareholder changes

## **Additional Services**

We do not have any hidden costs or commissions, nor do we take payment or commission from Contractors. The items listed below are not covered by our annual management fee, and would be chargeable on a previously agreed basis, if required:

- Answering Solicitors enquiries
- Preparation of Regulations/Guidelines/Welcome Pack
- Organising Buildings Insurance Valuations
- Alteration of Licences
- Organising repairs and quotations for Brokers, where the insurance is not arranged by House & Son, together with processing any final payment. Administration of policy documents and payment to insurers.
- Administration of major works
- Advice on Freehold purchase/Lease Extensions
- Out of hours meetings
- Company Secretarial Services

## Frequently asked questions relating to the appointment of a new Managing Agent

<b>Company Name, Address and Registration Number:</b>	House & Son Property Consultants Limited, Lansdowne House, Christchurch Road, Bournemouth BH1 3JW. Co Reg No: 06005331
<b>Directors:</b>	Mr Colin Wetherall BSc FRICS, Mr Neil Wren, Miss Sharon Gould
<b>How many staff in your company are involved with management? How many blocks do you manage, and how many units therein?</b>	We have a dedicated management department of 5 full time staff dealing with 94 blocks with a total of 1,528 units
<b>List any professional or trade bodies in which your company belongs.</b>	RICS and the Dispute Service
<b>Please list all those staff we are likely to liaise with and their qualifications.</b>	<p>Ms Helen Denby-Ashe Senior Property Manager</p> <p>Mr Andrew Taylor Property Manager</p> <p>Miss Kate Vermeulen Property Management Administrator</p> <p>Miss Bethany McDonald Property Management Administrator</p> <p>Mrs Gia Moroianu Accounts Administrator</p> <p>Miss Renata Skalik Accounts Assistant</p>
<b>Do your fees carry VAT?</b>	Yes, at the prevailing standard rate.
<b>How many years has the Company been established?</b>	House & Son was established in 1939.
<b>How can you convince us that you offer a quality service at a fair cost?</b>	We offer a service tailored to each individual block's requirements. Most of our blocks have been managed by House & Son for several years and our increasing portfolio is mainly due to recommendations from existing clients.
<b>How often do you review your management charges and how do you decide an increase?</b>	Annually when the Budget is agreed with the Directors.

<b>Details of all fee income associated with the block, e.g., insurance commission etc.</b>	Annual Management fee. Insurance commission as we deal with the claim, but we do get a competitive price for premium.
<b>To attend out of normal working hours meetings, if required.</b>	Up to 4 per year, preferably evenings rather than weekends.
<b>Advice/reports on Health &amp; Safety</b>	Yes
<b>How often does a representative from your company visit blocks you manage and check on how your contractors fulfil their obligations?</b>	The Property Manager will visit the property once a month or more frequently if major works are being carried out.
<b>What IT facilities do you have and what information can you record and keep updated?</b>	We use a software system specifically written for property management companies, called Vebra and all resident's names and correspondence addresses are also added to our mail merge within our Microsoft Office system which we use for general correspondence.
<b>Are you registered under the Data Protection Act?</b>	Yes.
<b>Where and how do you keep service charge monies, and how are they administered and who receives any interest?</b>	All bank accounts are held with HSBC. Each property we manage has its own current account where service charge monies are held and a reserve account where applicable. Interest received is credited to the individual account.
<b>How do you deal with unpaid service charges? What procedures are in place to deal with non-paying lessees?</b>	We have a strict arrears policy. If the service charge payment is not received within 7-10 days of the due date, an arrears letter is sent requesting immediate payment. If payment is still not received, then a Solicitor is instructed to collect the arrears, with their costs charged to the lessee. Interest can be charged on late payments if the lease allows and the Landlord/Directors agree.
<b>How do you deal with lessees in breach of their leases? How do you deal with complaints?</b>	Action would be dependent on the severity of the breach. For example, a noise issue would be dealt with initially by a phone call to the lessee. A more severe breach would result in a letter with solicitors being instructed, should the need arise.
<b>What length of notice period do you require?</b>	3 months after an initial 9 month contract.
<b>Do you offer an out-of-office hours service for emergencies? If so, please provide details.</b>	The office is manned 9am to 6pm Monday to Friday and Saturday 9am to 4pm. Emergency contractors' numbers are also posted in the communal areas of

	each block. All of our contractors are aware of their responsibilities, should they be called out. We also have a 24-hour emergency service run by an independent company. This is used by several of our blocks and further details are available on request.
<b>How comprehensive a panel of contractors do you have?</b>	We have a very comprehensive selection of contractors including plumbers, electricians, builders, drainage contractors and general property maintenance companies.
<b>Do you charge a fee for contractor selection and/or a percentage of their charges?</b>	No
<b>How are the contractors invoices paid?</b>	We hold their bank details and they are paid by BACS.
<b>What selection criteria do you use for contractors on your panels?</b>	We only use fully insured contractors who are usually recommended by current lessees. Most of our contractors have provided many years of reliable and competitively priced service.



## Additional Chargeable Services

We do not have any hidden costs or commissions, nor do we take payment or commission from contractors. The items listed below are not covered by our annual management fee and would be chargeable on a previously agreed basis, if required.

- Answering Solicitors enquiries
- Instructing Buildings Insurance Valuations
- Negotiating licences to permit alterations
- Organising repairs and quotations for brokers where the insurance is not arranged by House & Son together with processing any final payment. Administration of policy documents and payment to insurers.
- Administration of major works
- Advice on freehold purchase/lease extensions
- We reserve the right to charge for out of hours meetings in certain circumstances
- Company Secretarial service.



# House & Son's Other Departments

## Sales & Lettings

We are delighted to announce that last year our Sales team had another record-breaking year of property Sales. For new instructions, residents of blocks we manage receive a 15% discount off our Standard Sole Agency fee (normal terms and conditions apply).

If you are considering renting out your home or have a property portfolio that you would like us to manage, whether it is one flat or a few, House & Son can offer you a very competitive package for a fully managed service or on a tenant find only basis. If we manage the block your apartment is in, then you will be entitled to a reduction in the full management charge (normal terms and conditions apply).

## Surveys & Valuations

Our Survey & Valuations Department is based at our Lansdowne Office. The Department specialises in the Leasehold Reform Legislation, and can assist with Lease extensions and the acquisition of the Freehold. Our busy Surveyors, Colin and Annie, will be able to assist with all of your professional property requirements. Full details are available on our website.



**EXAMPLE BLOCK BUDGET ..../.... TO .././....**

<i>Accountancy Fees</i>	380
<i>Annual Return</i>	15
<i>Bank Charges</i>	150
<i>Buildings Insurance</i>	2250
<i>Cleaning</i>	700
<i>Company Secretarial Fees</i>	200
<i>D&amp;O Insurance</i>	200
<i>Electricity</i>	600
<i>Engineering Insurance</i>	250
<i>Fire Protection</i>	200
<i>Gardening &amp; Gardening Sundries</i>	1000
<i>Legal &amp; Professional Fees</i>	200
<i>Lift Lease Maintenance</i>	1500
<i>Lift Repairs</i>	500
<i>Management Fees</i>	2250
<i>Repairs</i>	2500
<i>Sundries</i>	115
<i>Water &amp; Sewerage</i>	4500
<i>Window Cleaning</i>	700
<b>SUB TOTAL:</b>	<b>18210</b>
<i>SINKING FUND</i>	1625
<b>TOTAL:</b>	<b>19835</b>

**Payable in two equal instalments of £..... per flat on ..... and .....**

**If you pay by Standing Order, please remember to contact your bank, to amend your payments to take into account any change in the budget. Please be advised that your bank/building society will not accept instructions from House & Son to amend your Standing Order.**

## Service Charge Actual Vs Estimate

**Property:**  
**Estimate Period:**            .././..... to .././.....  
**Actuals Period:**            .././..... to .././.....  
**Pro Rata fraction:**   366/366  
**Schedule:**                 Schedule 1 (Service Charge)  
**Description:**             Budget .././..... to .././.....  
**Date Created:**            .././.....  
**Date Edited:**             .././.....

Expense (Show expenditure in full)	Actual	Annual Estimate	Values Variance	Pro Rata Estimate	Values Variance
<b>Building Repairs &amp; Maintenance</b>					
<b>Cleaning &amp; Refuse</b>					
Cleaning	£551.40	£550.00	£ 1.40	£550.00	£ 1.40
Window Cleaning	£319.20	£300.00	£19.20	£300.00	£19.20
<b>General</b>					
Electric Works	£0.00	£200.00	-£200.00	£200.00	-£200.00
Fire Protection	£0.00	£150.00	-£150.00	£150.00	-£150.00
Repairs	£2,276.00	£2,600.00	-£324.00	-	-£324.00
				£2,600.00	
Sundries	£93.60	£0.00	£93.60	£0.00	£93.60
<b>Insurance</b>					
Building Insurance	£1,323.40	£1,400.00	-£76.60	£1,400.00	-£76.60
D&O Insurance	£0.00	£130.00	-£130.00	£130.00	-£130.00
Insurance Claim	-£945.00	£0.00	-£945.00	£0.00	-£945.00
<b>Professional Fees</b>					
<b>Accountancy</b>					
Accountancy Fees	£306.00	£320.00	-£14.00	£320.00	-£14.00
<b>Legal &amp; other Professional Fees</b>					
Bank Charges	£104.66	£120.00	-£15.34	£120.00	-£15.34
Company Secretarial	£300.00	£300.00	£0.00	£300.00	£0.00
Legal & Professional	£37.20	£0.00	£37.20	£0.00	£37.20
<b>Management Fees</b>					
Management Fees	£1,800.00	£1,800.00	£0.00	£1,800.00	£0.00
<b>Utilities</b>					
<b>Electricity</b>					
Electricity	<u>£122.98</u>	<u>£230.00</u>	<u>-£107.02</u>	<u>£230.00</u>	<u>-£107.02</u>
	<b>£6,289.44</b>	<b>£8,100.00</b>	<b>-£1,810.56</b>	<b>£8,100.00</b>	<b>-£1,810.56</b>

**PROPERTY DIARY**

<b>DATE</b>	<b>PROPERTY</b>	<b>ACTION</b>	<b>COMMENT</b>	<b>AMOUNT</b>
1/1/17	Bath Rd Bournemouth	Engineering Ins Renewal		£0.00
25/1/17	Bath Rd Bournemouth	Reserve Transfer		£0.00
1/3/17	Bath Rd Bournemouth	Health & Safety Inspection	Able Lifting 6 monthly check of harness etc	£0.00
25/3/17	Bath Rd Bournemouth	¼ Garage Rent		£0.00
23/4/17	Bath Rd Bournemouth	2 Month Budget Reminder		£0.00
29/4/17	Bath Rd Bournemouth	Ground Rent Reminder		£0.00
1/5/17	Bath Rd Bournemouth	Heating to be turned On/Off		£0.00
13/5/17	Bath Rd Bournemouth	Engineering Ins Renewal		£0.00
1/6/17	Bath Rd Bournemouth	Gate & Garage Door Testing	Openings	£0.00
23/6/17	Bath Rd Bournemouth	Building Insurance Renewal		£0.00
23/6/17	Bath Rd Bournemouth	Year End		£0.00
24/6/17	Bath Rd Bournemouth	Ground Rent Due		
24/6/17	Bath Rd Bournemouth	¼ Garage Rent		£0.00
24/6/17	Bath Rd Bournemouth	Locker Rent		£0.00
24/6/17	Bath Rd Bournemouth	½ Year Service Charge (New Budget)		£0.00
1/7/17	Bath Rd Bournemouth	Utility Contract Renewal	Gas Contract	£0.00
23/7/17	Bath Rd Bournemouth	Reserve Transfer		£0.00
1/9/17	Bath Rd Bournemouth	Health & Safety Inspection	Able Lifting 6 monthly check of harness etc	£0.00
29/9/17	Bath Rd Bournemouth	¼ Garage Rent		£0.00
1/10/17	Bath Rd Bournemouth	Heating to be turned On/Off		£0.00
30/10/17	Bath Rd Bournemouth	Ground Rent Reminder		£0.00
1/11/17	Bath Rd Bournemouth	Washer/Dryer Service	New Machine Purchased November 2015	£0.00
1/11/17	Bath Rd Bournemouth	Utility Contract Renewal	Electricity Contract	£0.00
1/12/17	Bath Rd Bournemouth	Parking Permits	Yearly Resident & Visitor 1 January to 31 December	£0.00
25/12/17	Bath Rd Bournemouth	Ground Rent Due		£0.00
25/12/17	Bath Rd Bournemouth	½ Year Service Charges		£0.00

## Property Tenant Arrears List

Property	Tenant	Part	Client	Phone	Period	O/S	Balance
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Nominal	Charge Date	To Date	Type	Demand No	Amount	O/S
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2. Service Charge	../..	../..	Svce-Ten Invoice	D38121	£499.06	£499.06
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Schedule 1	(Service Charge)					£499.06	<b>£499.06</b>
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92 Bank Service Charge	../..	../..	None – Ten Pmt	D38122	£500.00	£19.07
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Schedule 1	(Service Charge)				£499.06	£499.06	<b>£479.99</b>
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2. Service Charge	../..	../..	Svce-Ten Invoice	D38123	£499.06	£499.06
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Schedule 1	(Service Charge)					£499.06	<b>£499.06</b>
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**Total of Printed Arrears    £1,497.18**

**Total of Printed Credits    -£19.07**

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**Balance                                    £1,478.11**



## The Next Step

One of House & Son's experienced Property Managers shall be pleased to meet with you, to explain the services our Property Management Department can offer, and to discuss any specific questions you might have, relevant to your block of apartments.

Please contact us at the details on the following page, to set up a convenient time to meet at your building, so that we can tour the grounds and communal areas with you, and discuss your property's management requirements.

The Team at House & Son look forward to meeting you.

In the meantime, you might like to read some of our existing Client's comments about our service, on the following page....

# What Our Clients Say About Us

*"...I find you very understanding whilst maintaining your professionalism..." Mrs B*

*"...Thanks very much for the quick response. I'm certainly happy and impressed with the action being taken..." Mr S*

*"...Thank you again for the excellent way you managed our Company affairs and steered us to make the right decisions..." Mr C*

*"...Thank you very much indeed. Your efforts in dealing with this matter are greatly appreciated by us all..." Mr A*

*"...I just wanted to thank you for acting so promptly to the letter we sent you. Your efficiency is much appreciated..." Miss J*

*"...Thank you for your proactive attention to the fences etc. Thank you so much for keeping me up to date. Your professional stance is most welcomed ..." Mr B*

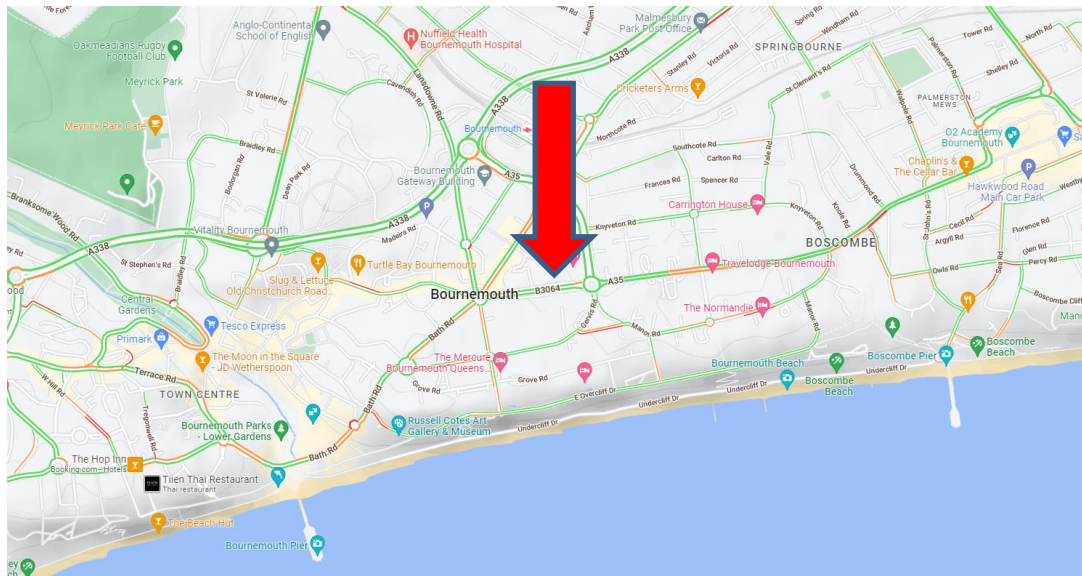
*"...Thanks for putting this together, it's refreshing to be managed by such a professional team for once..." Mr S B*

*"... Thank you very much for your time and effort in dealing with this on behalf of all the residents..." Mr N*





## House & Son's Lansdowne Office



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