



trinity

# Service Charge InformationPack

# Contents

- » About Trinity
- » Residents Communication
- » Your Questions Answered - Houses
- » Service Charge
- » Plot Matrix & 10-Year Forecast
- » Get in touch



# About Trinity

## Quality service is the priority of what we do in our business

Trinity is a leading Residential Property Management Company. We are committed to offering the highest standards of service to the developments that we manage.

We manage the full range of residential property across England and Wales from small blocks of flats to large city centre developments, mixed estates of houses and flats, refurbished country houses and cul-de-sacs of freehold houses. Trinity's directors and senior staff have many years experience in Residential Property Management.

Our dedicated customer service team based in Hertfordshire provide support to your locally based Property Manager who has the local knowledge and experience to manage your property.

## Our Customers

Each development is allocated a proactive and dedicated management team. Our office based customer support team will respond to most customer service enquiries, progress maintenance issues and deal with correspondence from our customers.

We have a network of locally based, experienced Property Managers, who are responsible for a number of development within their geographical area. The Property Manager places and supervises the various service contracts and completes regular development inspections to ensure the correct standards are maintained, they will also deal with any management issues.

# Residents Communication

## We've made it quicker and easier for you to report communal repairs

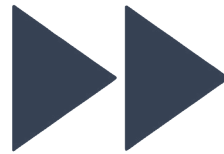
Introducing Fixflo our new online repair reporting tool



Report online  
24/7



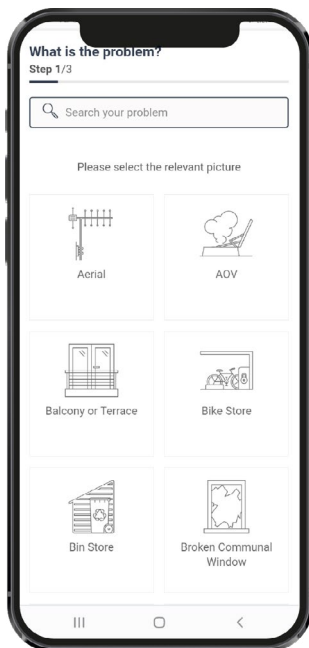
Over 40  
languages  
available



More details  
= faster fixes



Emails &  
updates sent  
to you



[trinityestates.fixflo.com](https://trinityestates.fixflo.com)

- Go to [trinityestates.fixflo.com](https://trinityestates.fixflo.com) from your phone, laptop or tablet
- Select your language and the most accurate picture and then fill in as much detail as possible
- Trinity will receive an instant notification and you will receive instant confirmation
- Our customer support team will progress the issue & you can login at any time to view the status of the issue

# Your Questions Answered - Houses

Trinity will send you a Welcome Letter once we begin management, providing you with our Residents Information Pack which contains further details about Trinity and the services we will be providing to you and your development.

## Who are Trinity?

Trinity (Estates) Property Management Ltd is a private national management company formed to provide the highest levels of service to residential properties. Once handed over into our care from the developer, Trinity are responsible for provision of services to the communal areas within your development as defined within your lease and for the benefit of you, the owners.

## What is a Service Charge?

The Service Charge is designed to cover the maintenance and running costs of your development. This depends on what type of property you live in but can include maintenance of any communal areas, insurance and maintenance of the communal structures, gardening, management of the estate etc. so that you, the owner, only need be responsible for the inside of your new home.

## How is the Service Charge Calculated?

Your first year's budget has been carefully calculated and agreed with the developer using all our experience, however for the first year at least, it must be remembered that this is an estimate. Subsequent budgets can be based on actual figures relating to your development from the year before.

## Will the service charge increase?

Our aim is to produce an initial Service Charge that will only increase in line with inflation after the first year although this cannot always be guaranteed. Trinity will manage your development carefully to try and ensure that any increases are kept to an absolute minimum whilst ensuring that the high standards of service are maintained.

# Your Questions Answered -Houses

## What are the insurance arrangements?

Trinity will arrange for Public Liability insurance for the communal areas, Terrorism cover and Employers liability where appropriate are also provided as part of the policy. **You will need to arrange your own buildings and contents insurance for your property.**

## How will my Development be managed?

Your transfer will set out the conditions for you living there, the owner of the developments rights and responsibilities and the Management Company's rights and responsibilities. In order to manage your development effectively all parties will be legally obliged to act in accordance with the transfer at all times.

## How do I pay for my service charge?

Your Service Charge is payable in advance and Direct Debit facilities are available for your convenience, otherwise it is payable in accordance with the frequency stated in your transfer.

Monies from all contributors are paid into a trustee bank account set up for your development and all services set out in your lease are paid for from this account.

Transactions in and out of the account are authorised every year by an independent firm of chartered accountants, and sent to each owner in line with the legal requirements of a Management Company.

## What is a sinking fund?

The Sinking Fund is a separate fund in your development's trustee bank account which is designed to build up as a contribution towards major items of expenditure for example, re-surfacing of private roadways, replacement of lighting etc. Including a Sinking Fund from the outset with all units contributing every year, enables better budgeting for these costs and should help to offset any additional payments by residents when major expenditure is required.

## What happens to monies I paid on completion?

Any monies you pay towards the service charge on completion of your property will be held in a separate trustee bank account under your name. This money will not be touched by us until Trinity begin providing services to your development.



trinity

# Service Charge Breakdown



Trinity Estates is Part of  
The Trinity Property Group

[< Back to contents](#)



# Get in touch

## We never stop putting our customers first

You can contact us in writing, by calling or submitting a form via our [website](#).

In the event of an out of hours building emergency requiring urgent attention, our out of hours company can be contacted using our usual contact number.

Please make sure that you keep us informed of your address for correspondence, particularly if you are not living at the property.



Trinity, Vantage Point  
23 Mark Road,  
Hemel Hempstead  
HP2 7DN



customersupport@  
trinityestates.com



0345 345 1584  
International:  
+44 1442437600

## Complaints Procedure

If you are dissatisfied in the first instance please ensure that you have raised your concern with Trinity, preferably in writing by email or letter to the appropriate person/department you have had dealings with. Any further complaints should be directed to our Customer Services Manager who will investigate the problem and will ensure that you are advised of the action that we are taking and likely time scales.





# Management Proposal

Site Name:	Lotmead
Location:	Swindon
Developer:	Vistry Cotswolds
Prepared by:	Nicole Baker
Submission Date:	30-Oct-2024
Revision:	A

## Taking Care of Property



# About Trinity

At Trinity, we have worked hard to build an excellent reputation with our clients. Our extensive residential management portfolio covers mixed-use, riverside & city apartment developments, housing estates with public open space and new and refurbished developments.

With extensive knowledge and expertise, Trinity is driven by exceptional people with a commitment to delivering a high service level to our customers.



6

National coverage  
split into 6 regions



44

Field Based  
Property Managers



94,000

Homes in  
management



53,000

Awaiting  
handover

Our regionally based Property Managers provide effective localised services and are supported by the full Trinity team based at our headquarters in Herefordshire. Working together, they ensure that the services we provide focus on the local community they serve, and we deliver services with the benefits and security that come from an established national service provider.

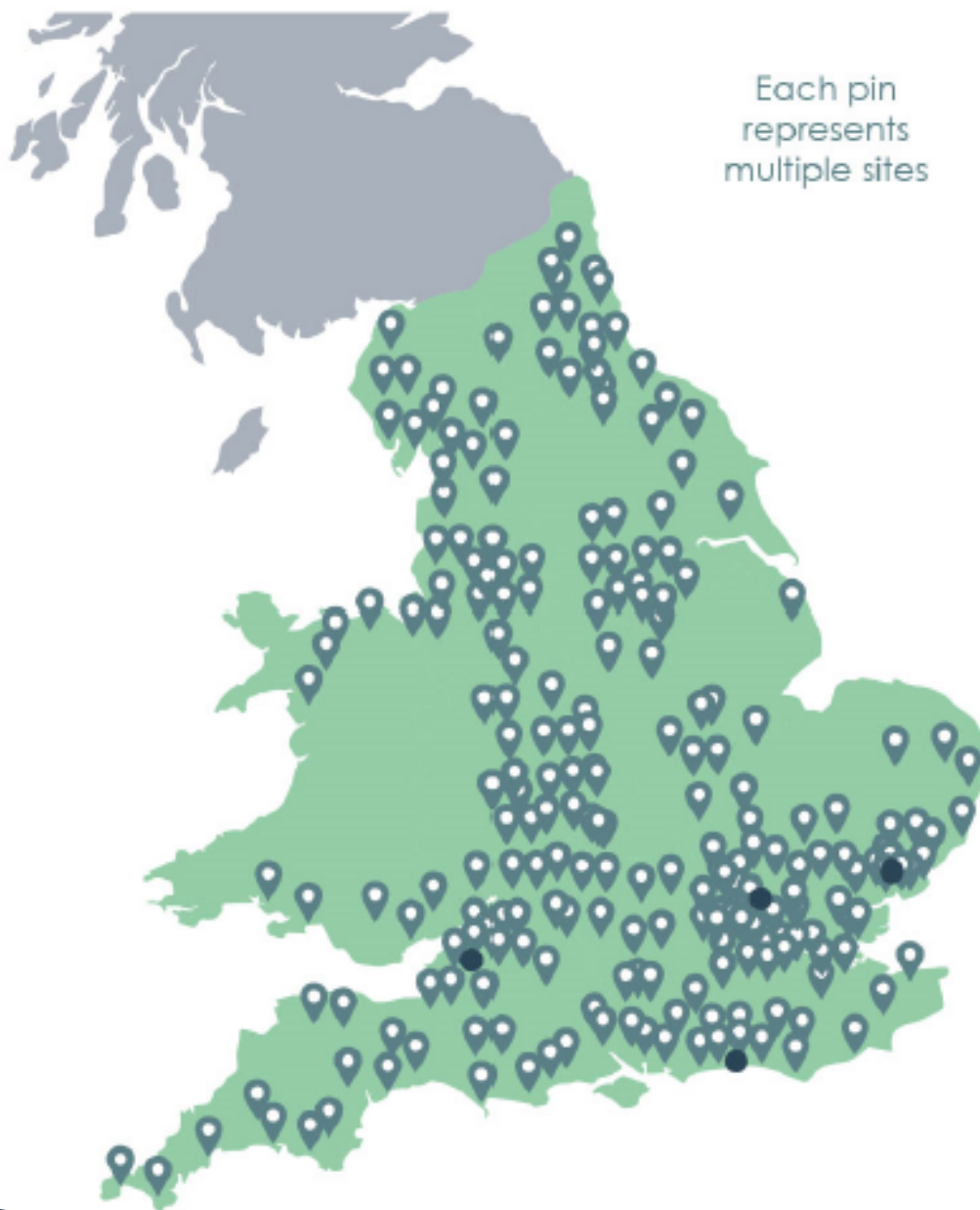
We are proud to have been the first managing agent to achieve the coveted full ARMA-Q (Association of Residential Managing Agents) status. This allows us to continually benchmark the quality of the services provided to our clients and means that we adhere to agreed regulated standards.

# National Coverage

## Providing tailored Block & Estate Management with a national coverage

Working with leading house builders across the country, Trinity provide residential management services nationally. Our property professionals are home based and are located locally to the sites they manage.

They are fully supported by a comprehensive team in our Hertfordshire head office which comprises, Surveyors, Accountants, Legal professionals and a large customer support team.



# Budget Summary

**Lotmead, Swindon**

Budget period ending 31/12/2025

No.	Item	Budget for the year	NOTES
1	<b>Landscape Maintenance</b>	£173,500	Landscape maintenance of Public Open Space (POS), includes cutting of grass, weeding, tending of flower beds, borders and shrubs, litter picking, sweeping of cycle links, walkways etc. Frequency and duration of visits will vary throughout the year i.e. more frequent and longer during growing season, less frequent and shorter during winter months
2	<b>Play Area Maintenance</b>	£6,600	Maintenance of the play equipment and its safety surface including treatment/painting as required etc
3	<b>Attenuation/Balancing Pond</b>	£20,000	Maintenance costs associated with the attenuation basins, swales, existing ditches, including any aquatic and marginal plant weeding/removal as necessary, maintenance of any water inlets, outlets and overflows, repair and maintenance of the banks etc.
4	<b>General Repairs &amp; Maintenance</b>	£8,796	Budgetary costs to cover for day to day repairs of external communal items such as cycle paths, dog & litter bins, benches, Sports Hub building, attenuation features etc. Such repairs exclude any work to private units or anything within their demise
5	<b>Private Roadway/Car Park Maintenance</b>	£3,299	Maintenance of the un-adopted permeable roadways/drives, including regular sweeping, weed treatments, re-silting etc.
6	<b>Arboriculturalist Costs</b>	£15,000	Costs relating to minor tree works that are required
7	<b>Reactive Refuse Removal</b>	£2,000	Removal of larger items of refuse or items not placed in bins properly
8	<b>Buildings Insurance</b>	£561	Includes comprehensive Buildings Insurance & Public Liability, plus specific Terrorism cover for Pavilion Building
9	<b>Insurance Valuation</b>	£112	Amount payable towards the cost of periodic insurance re-valuation by independent surveyors to ensure that the correct level of buildings insurance cover is maintained
10	<b>Directors &amp; Officers Insurance</b>	£587	This is to provide liability cover for the Directors of the Resident Management Company
11	<b>Public Liability Insurance</b>	£1,000	Includes comprehensive Public Liability cover
12	<b>Health &amp; Safety Assessment</b>	£1,734	The instruction of professional surveyors to carry out and certify inspections for required Health and Safety, Fire Risk and General Risk assessments
13	<b>Play Area Inspection Costs</b>	£3,720	Costs for regular Health & Safety inspection for 11x play equipment and safety surface
14	<b>Accountancy Fee</b>	£1,231	Annual fee for independent certification of Service Charge Accounts
15	<b>Management Fee</b>	£131,940	Trinity Management Fee set fee (not a percentage of total Service Charge)
16	<b>Company Administration/Secretarial Fee</b>	£336	Annual fee for the administration and filing of annual RMC accounts



17	<b>Banking Charges</b>	£63	Bank Charges relating to scheme trustee bank account
18	<b>Ecological Surveying Fee</b>	£1,500	Costs for the inspection of nature reserve areas, wildlife habitats, ie bird/bat box surveys, newt/vegetation inspections. These surveys will be carried out by fully licenced ecologists
19	<b>Redecoration Fund</b>	£550	A fund designed to build up and pay towards the cyclical re-decoration of the external communal areas
20	<b>Block Sinking Fund</b>	£1,100	A fund designed to build up and pay towards the long term maintenance of the blocks for items such as replacement external light fittings, fire systems, windows, roofing, external structure etc.
21	<b>Estate Sinking Fund</b>	£2,749	A fund designed to build up and pay towards the future costs of the estate and any associated major works
22	<b>Private Roadway Sinking Fund</b>	£2,199	A fund designed to build up and pay towards the future costs of the private permeable roadway and pavement re-surfacing and any associated items that may include, such as drainage/gullies etc.
23	<b>Arboricultural Sinking Fund</b>	£8,796	Contribution to the arboricultural fund for future tree and planting works
24	<b>Play Area Sinking Fund</b>	£6,597	A fund designed to build up and pay towards the future costs of the play area including re-surfacing and associated items such as replacement play equipment, gates, bins or benches etc.
25	<b>Sports Facilities/Equipment Sinking Fund</b>	£550	A fund designed to build up and pay towards the future replacement costs for any communal Sports equipment such as nets, football posts, signage etc.

<b>Total</b>	<b>£394,518</b>
--------------	-----------------

# Proposed Budget

Lotmead, Swindon

Budget period ending 31/12/2025

	<u>Expenditure Headings</u>	<u>Total Charges 2024/25</u>	<u>Estate Charge 2199</u>	<u>Sports Hub Charge 2199</u>
	<u>Regular/Cyclical (Contract) Maintenance</u>			
1	Landscape Maintenance	173500	143500	30000
2	Play Area Maintenance	6600	6600	
3	Attenuation/Balancing Pond	20000	20000	
	<u>General &amp; Reactive Expenditure</u>			
4	General Repairs & Maintenance	8796	6597	2199
5	Private Roadway/Car Park Maintenance	3299	3299	
6	Arboriculturalist Costs	15000	15000	
7	Reactive Refuse Removal	2000	2000	
	<u>Insurance</u>			
8	Buildings Insurance	561		561
9	Insurance Valuation	112		112
10	Directors & Officers Insurance	587	587	
11	Public Liability Insurance	1000	1000	
	<u>Health &amp; Safety</u>			
12	Health & Safety Assessment	1734	1734	
13	Play Area Inspection Costs	3720	3720	
	<u>Professional Fees/Services</u>			
14	Accountancy Fee	1231	1231	
15	Management Fee	131940	131940	
16	Company Administration/Secretarial Fee	336	336	
17	Banking Charges	63	63	
18	Ecological Surveying Fee	1500	1500	
	<u>Reserve Funds</u>			
19	Redecoration Fund	550		550
20	Block Sinking Fund	1100		1100
21	Estate Sinking Fund	2749	2749	
22	Private Roadway Sinking Fund	2199	2199	
23	Arboricultural Sinking Fund	8796	6597	2199
24	Play Area Sinking Fund	6597	6,597	
25	Sports Facilities/Equipment Sinking Fund	550		550
	<b><u>SERVICE CHARGE TOTAL</u></b>	<b>394518</b>	<b>357248</b>	<b>37270</b>

10 Year Budget Projections of Individual Service Charge Costs

Charge Type	2024/25 Annual Costs per Plot	2026 Inflation at 6%	2027 Inflation at 6%	2028 Inflation at 5%	2029 Inflation at 3%	2030 Inflation at 3%	2031 Inflation at 3%	2032 Inflation at 2%	2033 Inflation at 2%	2034 Inflation at 2%
Estate Charge	£162.46	£172.21	£182.54	£191.67	£197.42	£203.34	£209.44	£213.63	£217.90	£222.26
Sports Hub Charge	£16.95	£17.97	£19.05	£20.00	£20.60	£21.22	£21.85	£22.29	£22.73	£23.19

**Please Note:** Whilst TPG have prepared these estimates using reasonable skill and care, the actual constituent costs at the relevant time in each case may be higher or lower depending on various factors including (without limitation) inflation, changes in legislation, availability of supplies and services or the amendment of the contracted services. TPG therefore accepts no liability including (without limitation) liability for any loss damage or expenses howsoever arising from any reliance on the accuracy of these estimates or any part of them.