



trinity

# Service Charge InformationPack

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# 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

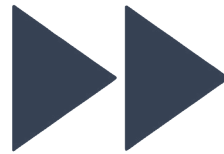
Introducing Fixflo our new online repair reporting tool



Report online  
24/7



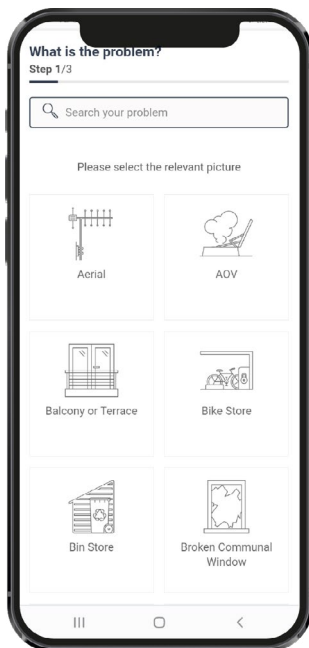
Over 40  
languages  
available



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.



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# Service Charge Breakdown



Trinity Estates is Part of  
The Trinity Property Group

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# Development Notes

Devizes, Wiltshire is a new development consisting of 114 private and 49 Housing Association (HA) dwellings, a mix of maisonettes, apartments and houses – 163 units in total

All 163 units will be required to contribute towards the **Estate Charge** for maintenance and upkeep of the areas of public open space, private roadways, courtyards, attenuation features, equipped play areas & professional fees etc.

The HA units will be required to contribute towards the Estate Charge in line with the private units, where applicable. There are no caps in place. The HA will be responsible for their own maisonette/apartment units

The main estate roadways, footpaths and associated lighting will be adopted by the Local Authority and will not be the responsibility of the Management Company. However, the Management Company will be required to manage some private driveways, visitor parking bays and parking courtyards, we have not accounted for private street lighting columns within private roadways

The estate foul and surface water drainage systems will be adopted by the Local Authority and will not be the responsibility of the Management Company

The Management Company will be responsible for the areas of public open space within the development, as highlighted on the Managed Areas Plan

The Management Company will be responsible for any informal footpaths, signage, railings, seating etc. located within the areas of managed POS

Arboriculturalist services will be required to maintain the older trees on the development

There is an attenuation basin and swales within the development – these will be the responsibility of the Management Company, along with any associated inlets, outfalls, signage, fencing etc.

There is a large equipped play area (NEAP & Trim Trail) within the development; this will be the responsibility of the Management Company along with any associated benches, railings, bins, signage etc.

Public liability insurance will be provided through the Service Charge to cover all the managed areas of open space



Refuse removal will be provided by the Local Authority as part of the Council Tax Charge

There will be a RMC (Residential Management Company) set up for the development and we have accounted for the related Secretarial Services, Directors & Officers Insurance etc.

Prior to commencement of management of the development by Trinity, the developer (or the developer's solicitors) shall provide a list of all those documents that Trinity is to observe in their management. The Developer shall indemnify Trinity against any liability resulting from any omission in that list and any failure of Trinity to meet any obligation in a document not included in that list

The Developer and Trinity agree that Trinity's management of the development shall be on the same terms as its management of developments it has already taken into management on behalf of the developer

# Budget Summary

Devizes, Wiltshire

Budget period ending 31/12/24

No.	Item	Budget for the year	NOTES
1	Landscape Maintenance	£21,600	Landscape maintenance of communal gardens, includes cutting of grass, weeding, tending of flower beds, borders and shrubs, litter picking, sweeping of parking areas, 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	Play Area Maintenance	£550	Maintenance of the play equipment and its safety surface including treatment/painting as required etc
3	Attenuation/Balancing Pond	£1,200	Maintenance costs associated with the attenuation features, 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	General Repairs & Maintenance	£815	Budgetary costs to cover for day to day repairs of external communal items such as tree stakes, railings, signage, visitor parking bays, pathways etc. Such repairs exclude any work to private units or anything within their demise
5	Private Roadway/Car Park Maintenance	£326	Maintenance of the un-adopted roadway and its associated items, including regular sweeping, weed treatments etc.
6	Arboriculturalist Costs	£800	Costs relating to minor tree works that are required
7	Directors & Officers Insurance	£450	This is to provide liability cover for the Directors of the Resident Management Company
8	Public Liability Insurance	£750	Includes comprehensive Public Liability cover
9	Health & Safety Assessment	£858	The instruction of professional surveyors to carry out and certify inspections for required Health and Safety, Fire Risk and General Risk assessments
10	Play Area Inspection Costs	£372	Costs for regular Health & Safety inspection for play equipment and safety surface
11	Accountancy Fee	£804	Annual fee for independent certification of Service Charge Accounts
12	Management Fee	£12,714	Trinity Management Fee (not a percentage of total Service Charge)
13	Company Administration/Secretarial Fee	£336	Annual fee for the administration and filing of annual RMC accounts
14	Banking Charges	£63	Bank Charges relating to scheme trustee bank account
15	Estate Sinking Fund	£326	A fund designed to build up and pay towards the future costs of the estate and any associated major works
16	Private Roadway Sinking Fund	£326	A fund designed to build up and pay towards the future costs of the private roadway and pavement re-surfacing and any associated items that may include, such as gullies, kerbs etc.
17	Arboricultural Sinking Fund	£489	Contribution to the arboricultural fund for future tree and planting works
18	Play Area Sinking Fund	£489	A fund designed to build up and pay towards the future costs of the play area including re-surfacing and associated items such as play equipment, gates or benches etc

Total	£43,268
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# Proposed Budget

## Devizes, Wiltshire

Budget period ending 31/12/24

<u>Expenditure Headings</u>		<u>Total</u> <u>Charges</u> <u>2024</u>	<u>Estate</u> <u>Charge</u> <u>163</u>
<u>Regular/Cyclical (Contract) Maintenance</u>			
1	Landscape Maintenance	£21,600	£21,600
2	Play Area Maintenance	£550	£550
3	Attenuation/Balancing Pond	£1,200	£1,200
<u>General &amp; Reactive Expenditure</u>			
4	General Repairs & Maintenance	£815	£815
5	Private Roadway/Car Park Maintenance	£326	£326
6	Arboriculturalist Costs	£800	£800
<u>Insurance</u>			
7	Directors & Officers Insurance	£450	£450
8	Public Liability Insurance	£750	£750
<u>Health &amp; Safety</u>			
9	Health & Safety Assessment	£858	£858
10	Play Area Inspection Costs	£372	£372
<u>Professional Fees/Services</u>			
11	Accountancy Fee	£804	£804
12	Management Fee	£12,714	£12,714
13	Company Administration/Secretarial Fee	£336	£336
14	Banking Charges	£63	£63
<u>Reserve Funds</u>			
15	Estate Sinking Fund	£326	£326
16	Private Roadway Sinking Fund	£326	£326
17	Arboricultural Sinking Fund	£489	£489
18	Play Area Sinking Fund	£489	£489
<u>SERVICE CHARGE TOTAL</u>		<b>£43,268</b>	<b>£43,268</b>

Each individual dwelling will contribute £265.45 per annum towards the Service Charge Budget

# 10 Year Budget Projections of Individual Service Charge Costs

Charge Type	2024 Annual Costs per Plot	2025 Inflation at 7%	2026 Inflation at 6%	2027 Inflation at 5%	2028 Inflation at 3%	2029 Inflation at 2%	2030 Inflation at 2%	2031 Inflation at 2%	2032 Inflation at 2%	2033 Inflation at 2%
Estate	£265.45	£284.03	£301.07	£316.13	£325.61	£332.12	£338.77	£345.54	£352.45	£359.50

**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.

# 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.