

# 81 Terry Smith Avenue

## Guidance Notes

### **Qualifying criteria to purchase a share in a shared ownership property.**

### **When selling a shared ownership property, please make any potential purchasers aware of the following points:**

- The applicant/s cannot already own a property in the UK or abroad.
- The property cannot be brought for investment purposes (unless it is being brought outright).
- The applicant/s will need to register to seek headline approval from a local Homebuy Agent before submitting an application form to the Association. Here is the link to find your local Homebuy Agent: [www.helptobuy.gov.uk/equity-loan/find-helptobuy-agent](http://www.helptobuy.gov.uk/equity-loan/find-helptobuy-agent)
- The applicant/s must provide evidence (on the application form) that they are unable to buy a similar property on the open market without the help of the shared ownership scheme.
- Advise if the property has a S106 Local Connection restriction and issue the LC form if the restriction applies.
- The applicant must meet the Associations affordability criteria, which is based on the information provided within the application form.
- Should there be more than one interested party applying for the property. All applicants must complete an application form for assessment by the Association. The property will be offered to the applicant with the greatest housing need based on the HCA Capital Funding Guide.
- The application form must be completed in full and returned to the Association with full supporting evidence/ supporting documentation to **Assignments@longhurst-group.org.uk**  
Please refer to the application form ie: Customer checklist, for details. Incomplete application will be returned directly to the marketing agent. Please see attached video to assist on how to complete the application forms.

# 81 Terry Smith Avenue Guidance Notes

**The applicant should not incur any costs until the application has been received and accepted by the Association.**

- Must make applicant/s aware of any staircasing restriction on the property if applicable and the remaining lease term of the lease, please refer to covering letter.
- In addition to the share being marketed, applicants should be made aware that they can purchase additional shares in the property from the Association should they wish.
- Once the application has been received and approved by the Association, a £250 non-refundable reservation fee is payable. This is credited to the rent account upon completion of the sale.

**Payments can be made over the telephone to 0300 123 1745.**

***Please note: a memorandum of sale will be required once a sale has been agreed to allow us to instruct our solicitors accordingly, please forward to [Assignments@longhurst-group.org.uk](mailto:Assignments@longhurst-group.org.uk)***

SOA3b.eg.n

# Rothwell – Northants Local Connection Questionnaire

This shared ownership scheme has a planning condition that requires applicants to demonstrate that they have a connection to the local area.

Please tick the criteria which applies to you (**only tick one box in each part**).

Ref.	Criteria	Tick
<b>Part 1</b>	<b>Connection to Rothwell</b>	
<b>A</b>	I am a resident of the Parish** and have been for at least the last 12 months	
<b>B</b>	I am not currently residing in the Parish however, I have previously been a resident for at least three out of the last five years	
<b>C</b>	I am not currently residing in the Parish however, I have previously been a resident for five out of the last ten years	
<b>D</b>	I am in employment or have an offer of employment where my primary location of work is within the Parish	
<b>E</b>	I am in temporary employment or have an offer of temporary employment (temporary means at least 12 months) where your primary location of work is within the Parish	
<b>F</b>	I have a close relative* currently residing within the Parish and who has lived there for the last 12 months	
<b>Part 2</b>	<b>Connection to Parishes adjacent to Rothwell** (within North Northants / Kettering)</b>	
<b>A</b>	I am currently a resident within one of the Parishes within the district and have been for at least the last 12 months	
<b>B</b>	I am not currently a resident in one of the Parishes within the district however, I have been for at least three out of the last five years	
<b>C</b>	I am not currently a resident within one of the Parishes adjoining the district however, I have been for at least five out of the last ten years	
<b>D</b>	I am in employment or have an offer of employment where my primary location of work is within one of the parishes adjoining the Parish	
<b>E</b>	I am in temporary employment or have an offer of temporary employment (temporary meaning at least 12 months) where my primary location of work is within one of the Parishes adjoining the district	
<b>F</b>	I have a close relative* currently residing within one of the Parishes within the district and who has lived there for the last 12 months	
<b>Part 3</b>	<b>Connection to Said Districts</b>	

# Rothwell – Northants Local Connection Questionnaire

<b>A</b>	I am currently a resident of any of the Parishes within the district and have been for at least the last 12 months	
<b>B</b>	I am not currently a resident of any of the Parishes within the district however, I have been for at least three out of the last five years	
<b>C</b>	I am not currently a resident of any of the Parishes within district however, I have been for at least five out of the last ten years	
<b>D</b>	I am in employment or have an offer of employment where my primary location of work is in any of the parishes within district	
<b>E</b>	I am in temporary employment or have an offer of temporary employment (temporary meaning at least 12 months) where my primary location of work is within any of the Parishes within the district	
<b>F</b>	I have a close relative* currently residing in any of the Parishes within the district and who has lived there for the last 12 months	
<b>Part 4</b>	<b>Connection to Northants</b>	
<b>A</b>	I am currently a resident of any of the parishes within the County*** and have been for at least the last 12 months	
<b>B</b>	I am not currently a resident of any of the parishes within the County*** however, I have been for at least three out of the last five years	
<b>C</b>	I am not currently a resident of any of the parishes within the County*** however, I have been for at least five out of the last ten years	
<b>D</b>	I am in employment or have an offer of employment where my primary location of work is in any of the parishes within the County***	
<b>E</b>	I am in temporary employment or have an offer of temporary employment (temporary meaning at least 12 months) where my primary location of work is within any of the parishes within the County***	
<b>F</b>	I have a close relative* currently residing in any of the parishes within the County and who has lived there for the last 12 months	

**Key:**

- \* A close relative means, father or step-father, mother or step-mother, son or step-son, daughter or step-daughter, brother or sister, grandparent, grandchild, wife, husband or civil partner
- \*\* Parish [\[Rothwell/Kettering\]](#)
- \*\*\* County Council [Northamptonshire County Council](#)

**Please provide the following information in support of your local connection.**

# Rothwell – Northants Local Connection Questionnaire

## 1) Details of your address(es) if your local connection relates to residency

	Applicant one	Applicant two
<b>Address and postcode</b>		
<b>Dates of residency</b>	<b>From:</b> _____	<b>To:</b> _____
<b>Address and postcode</b>		
<b>Dates of residency</b>	<b>From:</b> _____	<b>To:</b> _____

Please continue on a separate sheet if you have other addresses to be taken into account.

## 2) Details of your employment history if your local connection relates to place of work

	Applicant one	Applicant two
<b>Job Title</b>		
<b>Address and postcode</b>		
<b>Dates of Employment</b>	<b>From:</b> _____	<b>To:</b> _____
<b>Job Title</b>		
<b>Address and postcode</b>		
<b>Dates of Employment</b>	<b>From:</b> _____	<b>To:</b> _____

Please continue on a separate sheet if you have other employment to be taken into account.

## Details of your Close Relatives if your local connection relates to family residency

# Rothwell – Northants Local Connection Questionnaire

	<b>Applicant one</b>	<b>Applicant two</b>
<b>Relationship</b>		
<b>Address and postcode</b>		
<b>Dates of Residency</b>	<b>From:</b> _____ <b>To:</b> _____	<b>From:</b> _____ <b>To:</b> _____
	<b>Applicant one</b>	<b>Applicant two</b>
<b>Relationship</b>		
<b>Address and postcode</b>		
<b>Dates of Residency</b>	<b>From:</b> _____ <b>To:</b> _____	<b>From:</b> _____ <b>To:</b> _____

Please continue on a separate sheet if you have other addresses to be taken into account.

## Declaration

I/We confirm that the information provided is correct and accurate and accept that we may be asked to provide evidence to support the information provided on this form.

I/We accept that if I/we deliberately give false information then our application will be rejected or we could be open to future action that could put our home at risk.

**Applicant one**      Signature \_\_\_\_\_      Date \_\_\_\_\_

**Applicant two  
(if applicable)**      Signature \_\_\_\_\_      Date \_\_\_\_\_

# Shared Ownership Application Form

## Local Connection Identification

Priority will be given to applicants with a connection to **Rothwell** and adjacent parishes. Other applications will be considered once the local connection aspect has been exhausted.

Please complete this form to register your priority, if applicable. Current residency information will be taken from the Local Connection Questionnaire.

Name of Applicant(s) \_\_\_\_\_

**Previous residency in **Rothwell** or adjacent parish**

Name	
Address	
Dates	
Tenure i.e. Owner, Living with family, renting	
Reason for leaving	

**Employment in **Rothwell** or adjacent parish**

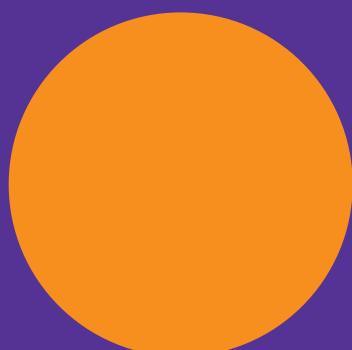
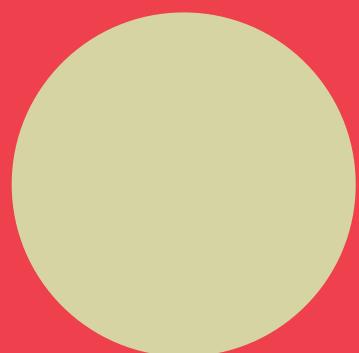
	First Applicant	Second Applicant
Employers name, address & telephone number		
Date started		
Permanent or temporary		

**Relative in **Rothwell** or adjacent parish**

Name		Name	
Address		Address	
Relationship			
Date moved there			

Signature(s) \_\_\_\_\_

# Application Form



Please fill in this form in **BLOCK CAPITALS** using black ink, then send it to the address at the back of the form. We are unable to consider your application unless all sections are fully completed.



## 1 | Product

### Listed below are the products available at the time of printing this form

Please indicate which one(s) you are interested in by ticking the relevant box(es).

Shared Ownership

Shared Ownership for the elderly

Other product (please give details below)

Rent to Buy

\_\_\_\_\_

\_\_\_\_\_

Are you interested in a particular development or property? Please let us have the details:

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## 2 | About you

### Your Details

Title (Mr/Mrs/Ms/Other)

---

Surname

---

First name

---

Middle name

---

Date of birth (DD/MM/YY)

---

Address

---

---

---

---

Postcode

---

Home telephone number

---

Mobile telephone number

---

Email address

---

### First applicant

### Second applicant

### Have you served in the UK armed forces?

Still serving

---

Yes  No

Left up to and including two years ago

---

Yes  No

Never served

---

Yes  No

Refused

---

Yes  No

Yes  No

Yes  No

Yes  No

Yes  No

### Are you the partner of a deceased member of the UK armed forces?

Yes  No

Refused  N/A

Yes  No

Refused  N/A

### 3 | Household members

Which local authority area do you live in?

If working, which local authority area do you work in?

#### First applicant

#### Second applicant

Please provide details below of anyone else who will be living in your household.

First name	Middle name(s)	Surname	Relationship to first applicant	Gender	Date of birth

### 4 | Your household

Number of people living in your household

How would you describe the composition of your household

Single  Couple

Couple with children

Single with children

Sharing

Do you have any pets?

Yes  No

If yes, please specify type and number:

N.B. If your application is successful, a completed Permissions Form will be required

## 5 | About your housing

### Your current housing

Does any applicant currently own a property in the UK or abroad?

Yes  No

Yes  No

If yes, please provide details of owned property

If yes, it is a Shared Ownership property?

Yes  No

Yes  No

If yes, what percentage share do you currently own?

What stage is the sale process at?

Offer accepted

Yes  No

Yes  No

Solicitors instructed

Yes  No

Yes  No

What date are you expecting to complete on the sale of the property?

Date:

Date:

What is the approximate current full value of the property?

£

£

Please provide the amount of equity you have/will receive?

£

£

### What is your current housing status?

A first time buyer

Yes  No

Yes  No

Property owner

Yes  No

Yes  No

Previously owned a property

Yes  No

Yes  No

On a council waiting list

Yes  No

Yes  No

### If you answered 'yes' to 'first time buyer' or 'previously owned a property' please provide your residential status

Council/housing association tenant

Yes  No

Yes  No

Living with friends or family

Yes  No

Yes  No

Renting privately

Yes  No

Yes  No

### If renting privately

Amount of monthly rent paid

£

£

Have you been in rent arrears in the last 12 months?

Yes  No

Yes  No

Landlord's name

\_\_\_\_\_

\_\_\_\_\_

Landlord's address

\_\_\_\_\_

\_\_\_\_\_

Landlord's telephone number

\_\_\_\_\_

\_\_\_\_\_

**Are you on a council or local authority list?  
If, yes please give details below.**

Yes

No

Please specify the council housing list reference number

If you are a council, housing association or a private tenant, please give the name, address and telephone number of your landlord and, if applicable, the name of your housing officer

**Are you registered with a Help to Buy Agent?**

Yes

No

If yes, please specify which one

Please state the reference number provided by the Help to Buy Agent

**Are you on another Housing Association list?**

Yes

No

What date did you move into your current property?

How many bedrooms does your current home have?

1

2

3

4

Other

What type of property is your current home?

Studio

Apartment

House

Bungalow

Yes

No

Yes

No

Yes

No

1

2

3

4

Other

Studio

Apartment

House

Bungalow

## 6 | Your employment

	First applicant		Second applicant	
Company name				
Company address				
Occupation/Job title/Grade				
Are you permanently employed? (if no, please advise when your contract is due to end)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
When did you start working for this employer?				
<b>Economic status</b>				
Full time work (30+ hours per week)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Part time work (less than 30 hours per week)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Self employed	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Government training/new deal	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Job seeker	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Retired	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Not seeking work	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Full time student	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Unable to work due to long term sickness or disability	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Child under 16	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Stay at home parent/guardian	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Other adult	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

## 7 | About your income

	First applicant	Second applicant
What is your total annual income before deductions? Exclude overtime and bonuses but include pensions. Please provide three months proof of earnings or 13 weeks if paid weekly	£	£
How much overtime, bonuses and commission do you normally earn in a year? All values below are needed on a monthly basis	£	£
Are you in receipt of any benefits? If yes, please specify the type of benefits and how much you receive per month	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Child Tax Credit/Working Tax Credit	£	£
Child Benefit	£	£
State Pension/Minimum Income Guarantee/Pension Credit	£	£
Private Pension	£	£
Widow's Pension/Bereavement	£	£
Income Support	£	£
Attendance Allowance	£	£
Disability Living Allowance	£	£
Disabled Persons Tax Credit	£	£
Industrial Injuries Benefit	£	£
Incapacity Benefit	£	£
Child Support/Maintenance	£	£
Universal Credit	£	£
Other benefits	£	£
Total monthly income	£	£
How will you be funding your purchase?	<input type="checkbox"/> Cash <input type="checkbox"/> Mortgage	
What are the total combined savings for your household?	£	

## 8 | On-going financial commitments

Please provide all supporting documentation i.e. monthly statements of any outstanding financial commitments

Do you have any outstanding loans?

### First applicant

### Second applicant

Yes  No

Yes  No

Remaining term of loan (in months)

£ \_\_\_\_\_

£ \_\_\_\_\_

Please provide details of final payments dates

Date: \_\_\_\_\_

Date: \_\_\_\_\_

What is the monthly payment amount?

£ \_\_\_\_\_

£ \_\_\_\_\_

What was the purpose of the loan?

For: \_\_\_\_\_

For: \_\_\_\_\_

Do you have any outstanding credit cards?

Yes  No

Yes  No

If so, how much is the outstanding balance?

£ \_\_\_\_\_

£ \_\_\_\_\_

And what is the monthly payment amount?

£ \_\_\_\_\_

£ \_\_\_\_\_

What are the repayments for? (For example car loan)

Yes  No

Yes  No

For example child maintenance

Yes  No

Yes  No

If yes, please specify how much you pay per month and the reason:

£ \_\_\_\_\_

£ \_\_\_\_\_

For: \_\_\_\_\_

For: \_\_\_\_\_

## 9 | Customer checklist

To enable your application to be processed, please ensure that the following supporting documentation is completed and supplied with your application. Please be aware that we are unable to assess your application without the full evidence/supporting documentation being provided.

- Fully completed signed and dated application form
- Photographic ID i.e. Copy of Passport/Photo Driving Licence
- Copy of Visa/Residence Permit (if applicable)
- Proof of address i.e. utility bill/bank statement (within three months of date)
- Copy of mortgage Agreement In Principle (AIP)
- Copy of all savings/mortgage deposit
- Proof of all income, including bonuses/guaranteed overtime and any other income i.e. pension/benefits (three months' evidence required or 13 weeks if paid weekly)
- Three year's worth of accounts if self employed
- Proof of any ongoing loans/credit commitments
- If a current homeowner, evidence of sale from estate agent, solicitor and mortgage redemption/draft completion statement is required

## 10 | Equal Opportunities Each applicant – please tick one box per section.

This information is important in helping us to monitor sales and performance to ensure that everyone has an equal opportunity to live in our homes and receive our services. We hope that you will be able to provide these details, but please indicate below if you prefer 'not to say'.

## Fair processing notice

The information you provide on this application form will be processed in accordance with Longhurst Group's Privacy Statement which can be found on our website at: [longhurst-group.org.uk/dataprotection](http://longhurst-group.org.uk/dataprotection). A copy can be requested from [data.protection@longhurst-group.org.uk](mailto:data.protection@longhurst-group.org.uk).

## Data Controller

Longhurst Group Limited is a data controller for the purposes of your application. Our data protection officer can be contacted at **data.protection@longhurst-group.org.uk** or by writing to Leverett House, Gilbert Drive, Endeavour Park, Boston, Lincs PE21 7TQ. Please see our Privacy Statement for more details.

## Purpose of the processing

We will use the details provided by you in this application to assess your application to purchase a home from Longhurst Group and to assess your ability to meet our affordability criteria. We will also use the information to support our housing management services which includes, but is not limited to rent collection, undertaking defect repairs, and general housing and estate management. On page 11, you will see the categories of data we process about you, along with the relevant purpose and lawful basis.

## How we collect your data

We collect the majority of your Personal Data directly from you. Longhurst Group may seek a rent reference from your current or previous landlord, as well as information from your employer about your employment status and income.

You will be informed of any information received about you from a third party source.

Where we need to collect personal data by law, or under the terms of a contract we have with you, if you fail to provide that data when requested, we may not be able to perform the contract we have or are trying to enter into with you.

## Recipients of your data

We will share information within Longhurst Group as part of our regular reporting and monitoring activities, to achieve the purposes listed above and in accordance with our Privacy Statement.

We may also share information with other third parties where we are permitted to do so under data protection legislation, such as where your safety or the safety of others is at risk, the prevention and detection of fraud, and to prevent and detect crime.

Should your sale proceed we will share your information with our legal representatives, and we will also share information with our Regulator, Help to Buy Agent, as required for regulation and for monitoring purposes. Specifically we will also use the information you have provided to complete a CORE housing record for statistical and research purposes. Please see the separate Privacy Notice relating to CORE which should accompany this application.

Should your sale proceed, we will share information with local authorities and utility companies to ensure correct billing and to protect Longhurst Group from debt.

For more detailed information please refer to our Privacy Statement.

## Transfers to countries outside the EEA

We share your personal data within Longhurst Group. This sometimes involves transferring your data outside the European Economic Area (EEA). Where this occurs we ensure a similar degree of protection is afforded to such data, and this is detailed within our Privacy Statement.

## Retention of your information

We will only retain your personal data for as long as is reasonably necessary to fulfil the purposes we collected it for. Please see Appendix 3 of our Privacy Statement for full details or contact us on the email address provided above.

## Your rights

Under certain circumstances, by law you have the right to:

- Request access to your data.
- Request correction of the data that we hold about you.
- Request erasure of your data. You also have the right to ask us to delete or remove your data where you have exercised your right to object to processing (see below).
- Object to our processing of your data. This is an absolute right if we are using your data for direct marketing.
- Request the restriction (or suspension) of processing of your data.
- Request the transfer of your data to another party.
- To exercise any of these rights, please contact [data.protection@longhurst-group.org.uk](mailto:data.protection@longhurst-group.org.uk) in writing. No fee is usually required unless your request for access is unfounded or excessive.

## Data categories

Category/Special Category of Personal Data	Purpose of processing	Lawful Basis for processing Personal Data/Condition for processing Special Categories of Personal Data
<ul style="list-style-type: none"> <li>• <b>Contact details</b></li> <li>• <b>Date of birth</b></li> <li>• <b>Identification</b></li> <li>• <b>Photographs</b></li> <li>• <b>Immigration status information</b></li> </ul>	To allow us to check your identity and to confirm your immigration status and to contact you with any queries we may have concerning your application and future purchase, and to complete survey/statistical returns	To comply with a legal and regulatory obligation and for the purpose of entering into a contract with you.
<ul style="list-style-type: none"> <li>• <b>Accommodation and housing history (to include mortgage and rent payment information)</b></li> </ul>	To help us make an assessment of your ability to purchase a home and meet future housing costs and to complete survey/statistical returns	To comply with a legal and regulatory obligation and for the purpose of entering into a contract with you.
<ul style="list-style-type: none"> <li>• <b>Employment status and income details</b></li> <li>• <b>Ongoing financial commitments</b></li> <li>• <b>Occupant details and household composition</b></li> <li>• <b>Membership of the armed forces</b></li> </ul>	To help us make an assessment of your ability to purchase a home and meet future housing costs and complete survey/statistical returns	To comply with a legal and regulatory obligation (including performance of a task carried out in the public interest) and for the purpose of entering into a contract with you.
<ul style="list-style-type: none"> <li>• <b>Race</b></li> <li>• <b>Ethnic Origin</b></li> <li>• <b>Religion</b></li> <li>• <b>Sexual life</b></li> <li>• <b>Sexual orientation</b></li> <li>• <b>Disability</b></li> </ul>	You don't have to provide this information, but if you do, we will use it solely to support our equality monitoring purposes and legal and regulatory requirements (survey/statistical returns)	Necessary (for reasons of substantial public interest) for our legal and regulatory requirements, and for our legitimate interests (to support our equality monitoring purposes) and for which we have your explicit consent
<ul style="list-style-type: none"> <li>• <b>Contact details and family life/ social circumstances</b></li> </ul>	To make suggestions and recommendations to you about goods or services that may be of interest to you	Necessary for our legitimate interests (to develop our products/services and to grow our business)

## 11 | Declaration

You must not make any false statement and you must provide all relevant information to allow us to correctly assess your application. If you purchase a home under false pretences, we may take legal action against you to recover the property.

If you are related to any employees or Board Members of Longhurst Group please give details:

	First applicant	Second applicant
Name		
Relationship to you		

I/we hereby declare that all information provided in this form is a full statement of my/our circumstances and all details are true, accurate and complete. I/we confirm that there is nothing further that we would like to advise that could affect my/our ability to purchase a home from Longhurst Group. I/we understand that completing this application form does not guarantee me/us an opportunity to purchase a home

I/we authorise my/our landlord to supply a rent reference to Longhurst Group in support of this application.

I/we authorise my/our employer(s) to disclose any relevant information regarding my/our earnings or employment status to Longhurst Group in support of this application.

By signing below I/we accept and understand the terms of this Fair Processing Notice and the Privacy Statement which supplements it.

I/we consent to Longhurst Group processing:

**Details of my race, ethnicity, nationality, religion, disability and sexual orientation for equality monitoring purposes.**

I/we understand that where I have consented to provide information I/we can withdraw this consent at any time by contacting [dataprotection@longhurst-group.org.uk](mailto:dataprotection@longhurst-group.org.uk).

### Contacting you about our goods and services

Longhurst Group and its subsidiaries would like to be able to contact you about other housing developments and purchasing opportunities provided by Longhurst Group and its subsidiaries.

If you consent to being contacted for this purpose, please tick to tell us how you would like us to contact you:

Post     Email     Telephone     Text message

The Group also appoints agents to manage the promotion of sales opportunities on our behalf.

I/We consent to our details being shared with appointed selling agents for the purposes of providing further promotional information.

**Signed – First Applicant:**

Date:

**Signed – Second applicant:**

Date:

**Please check you have filled in all sections, otherwise the form will be returned to you.**

**Return your completed form to:** Simon and Co Estate agents, along with the supporting documents Listed at section 9, application received without all supporting documents will not be assessed for the property