

Block Management Questionnaire

Please answer the questions below as this will enable us to come back with a tailored response.

1) Do you have a current Managing Agent?

2) Why are you looking to move?

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3) Do the residents own the freehold jointly?

.....

4) How many of the residents have a share of the freehold?

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5) How many residents occupy under original leases?

.....

6) Is there a freehold/management company?

.....

7) If so how many Directors are on the board?

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8) What are the lines of communication between your current Managing Agents and the Directors?

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9) When was the block built?

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10) How many flats/apartments are in the block?

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11) Is there a lift?

.....

12) Is there a caretaker on or off site?

.....

13) Is there any car parking and or garages?

.....

14) How many occupants are owner occupiers and how many are tenants?

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15) Is there a ground rent? If so what is it?

.....

16) What is the current service charge?

.....

17) Are there any arrears?

.....

18) Are there any outstanding disputes?

.....

19) What is the current budget?

.....

20) When were the last major works carried out and what were they?

.....

21) Do you have a preferred list of contractors?
'The Service' to be provided by the Agent

.....

Please read the points below and tick which aspects of property management are required. This is a précis version of the points stated in the standard RICS Agreement document.

- | | |
|---|--|
| <p>1.1 to collect current instalments, any arrears of rent, service charges, contingency and future expenditure fund contributions, and any other payments due from leaseholders/tenants of the property, and hold such sums in accordance with the RICS Members' Accounts Regulations until disbursements
_____ <input type="checkbox"/></p> | <p>1.9 to attend to routine enquiries from the Client or any tenant, tenants association, or auditor
_____ <input type="checkbox"/></p> |
| <p>1.2 to inspect the common parts of the Property at an agreed frequency
_____ <input type="checkbox"/></p> | <p>1.10 to provide quarterly statements of account to the Client
_____ <input type="checkbox"/></p> |
| <p>1.3 to prepare an annual estimate of future expenditure, administer any service charge or contingency and future expenditure funds and prepare and distribute appropriate service charge accounts
_____ <input type="checkbox"/></p> | <p>1.11 to provide information to solicitors and others in connection with enquiries on sales (fees are chargeable to those applying for information)
_____ <input type="checkbox"/></p> |
| <p>1.4 to administer contracts and check demands for payment of goods and services where the cost falls within the expenditure limits as agreed
_____ <input type="checkbox"/></p> | <p>1.12 to produce for inspection receipts or other evidence of expenditure and provide VAT invoices (if any)
_____ <input type="checkbox"/></p> |
| <p>1.5 to employ staff, either part-time or full-time, residential or not and pay their remuneration, in accordance with agreed terms
_____ <input type="checkbox"/></p> | <p>1.13 to provide a written statement after the end of each agreed accounting period of:
_____ <input type="checkbox"/></p> |
| <p>1.6 to arrange insurance in respect of the Property
_____ <input type="checkbox"/></p> | <p>(a) moneys due, showing how much the Agency has received and any interest due to the Client that has accrued on moneys received
_____ <input type="checkbox"/></p> |
| <p>1.7 to advise the Client when notices should be served
_____ <input type="checkbox"/></p> | <p>(b) remuneration due to the Agent
_____ <input type="checkbox"/></p> |
| <p>1.8 to keep files of leases and other documents relating to the Property that have been supplied to the Agent
_____ <input type="checkbox"/></p> | <p>(c) expenses and other disbursements made on behalf of the Client and whether any VAT is included
_____ <input type="checkbox"/></p> |
| | <p>(d) any sum due of the Agency or deducted in calculating (a) above for bank charges relating to the administration of a service charge
_____ <input type="checkbox"/></p> |