

T: (+44)1202 901709 | info@pssgroup.co.uk | www.pssgroup.co.uk

a modern approach to property management



**BLOCK MANAGEMENT
FLAT MANAGEMENT
ESTATE MANAGEMENT
FREEHOLD | RTM | RMC | HEAD LEASE
ENFRANCHISEMENT**



THE PROPERTY OMBUDSMAN

Approved Redress Scheme

WHO ARE MALLORIE ESTATES ?

Established in 2007, Property Solutions (Southern) Limited trading as Mallorie Estates since 2023, is a Dorset based, family run business that provides a complete range of professional management services for flat owners, developers and investors alike.

Our portfolio contains a variety of properties of different size, style, age and location (at present we represent properties all across Dorset, Hampshire, Wiltshire, West Sussex, Surrey and Greater London).

Our clients enjoy excellent levels of service & communication whilst our modern approach to management embraces the latest technology to ensure that all of our clients have complete access to their property information at all times.

WHY CHOOSE MALLORIE ESTATES ?

✓ Value ✓ Quality ✓ Service

Value -	Competitive Prices, Fixed Fee (annual), No Hidden Charges
Quality -	High Standards, RICS Code of Practice, ARMA Registered, Redress Scheme
Service -	Family Run, Friendly Experienced Team, Latest Technology

OUR RESPONSIBILITIES

As a Managing Agent, Mallorie Estates main responsibility is to ensure that our clients duties are fulfilled as set out by the terms of the Lease. Our clients may be a Management Company, Freeholder, a Residents Association, Right to Manage Company (RTM) Residents Management Company (RMC) or Head Lessee.

As almost all leases are different, the management of each property must be adapted to comply with the provisions set down in each specific lease.

As a Managing Agent we ensure that the management of a property is carried out in compliance with the relevant statutes i.e. the Landlord & Tenant Act 1985 (as amended) commonhold & leasehold reform act (2002) and also in line with the RICS code of Practice (2nd edition).

MANAGEMENT SERVICES;

Our principal activities at the property & services we can provide will include the following:

- Remittance of property invoices, contractors, utilities etc.
- Arrangement of repairs & maintenance works.
- Coordination of both 5 & 10 year maintenance schedules.
- Preparation of annual accounts (including interfacing with accountants)
- Regular property inspections.
- Organisation and attendance of residence meetings (AGM).
- Full compliance with current & pending legislation.
- Health & Safety risk assessments.
- 24/7 - 365 day a year emergency contact
- Full financial packages (which can be tailored to individual requirements).
- Collection of Service Charges and Ground Rent (as applicable)
- Prompt payment to all our contractors.
- Preparation/distribution of interim financial reports
- Preparation of service charge budgets & forecasts.
- Organising building insurances, including valuations and claim handling.
- Preparation of year-end accounts and returns.
- Full accounting service and liaison with Auditors including Tax advice.
- Appointment and supervising contractors.
- Prompt response to any emergencies or repairs.
- Liaison with residents on all matters and organising meeting were required.
- Regular property inspection both internally & externally.
- Ensuring full compliance with all Lease Covenants.
- Full range of advice on all Management Issues.
- Regular reports to clients or appointed representatives

ACCOUNTING/BOOKKEEPING;

We offer a wide range of accounting services (using a dedicated accounting software package) which can be tailored to the requirements of the individual property. At the end of the financial year all of our financial records for the property are independently certified with accounts distributed to all leaseholders.

SECURITY OF PROPERTY FUNDS;

A segregated bank account (client account) will be set up on behalf of the Company/Freeholder/Client with all funds received held in accordance with the strict RICS/ARMA client money guidelines. Our access & permissions in relation to the account would be agreed with the client in advance.

CAN THE PROPERTY RECORDS MAINTAINED FOR THE PROPERTY BE INSPECTED?

Yes, at any time you can make an appointment to come into our office to review the files, invoices, statements and documentation held on our files for your property.

WHAT HAPPENS IF PEOPLE DO NOT PAY THEIR PROPERTY (SERVICE) CHARGES?

Unfortunately it is not uncommon to have this situation and at many properties there tend to be one or two individuals who will not be able to or be prepared to pay their charges allocated to them under the terms of their lease.

The efficient management of the property requires that any demands for Ground Rent, Service charges, Buildings Insurance and any other lawfully demanded charges each year are paid promptly on the due dates as your Lease requires.

Whilst we will try to be as flexible as possible with leaseholders under our management (including offering the option of a payment plan where possible) it is unfair and inequitable for other leaseholders to suffer the consequences to support to the building as well as incurring additional costs involved in continually chasing late payments.

As a result when it is clear that remittance is not forthcoming we refer the debt recovery to our Solicitors (Brady Solicitors) who are national specialists in debt recovery specialising in blocks of flats and lease issues.

Brady's undertake work on a no-win no-fee basis and are extremely efficient, In 2011/2012 and 2013/2014 they were successful winners of 'SOLICITORS OF THE YEAR' at the Property Management Awards and were Finalists in 2012/2013. In 2018 they were also the winners of the prestigious ARMA ACE award.

Working with Brady's our record in recovering financial arrears is excellent with no professional charges applied to the property account.

INSURANCE;

We can arrange insurance quotations for buildings, lifts, public liability etc which would be presented to the property representatives for approval. With regards to insurance claims, we would act on your behalf to process any claims, liaise with the broker to lodge a claim, gather quotations for submission to the insurance company and monitor any subsequent works which takes place.

DISHONOURED CHEQUES;

In order to cover administration a fee of £25 will be charged for each dishonoured cheque.

BUILDING ISSUES

MAINTENANCE & REPAIRS;

Mallorie Estates maintain an extensive list of local, trusted contractors who provide prompt attention to any maintenance, repairs or emergency issues.

The company also operates a 24/7 - 365 days a year emergency service.

ARRANGEMENT FOR ANNUAL INSPECTION OF FLAT ROOFS BY A ROOFING CONTRACTOR;

This is often a requirement of your buildings insurance and is an essential element of good building management. These inspections can be undertaken by a specialist roofing contractor (if preferred) but recently, we are taking more advantage of drone technology which is less expensive and more versatile with high-definition photos & videos being available to the clients.

This is another service we can offer where appropriate and a full report will be submitted to the client along with any recommendations.

ARRANGEMENT OF PERIODIC HEALTH & SAFETY CHECKS;

In addition to our regular inspections of the property, our frequent communication with residents and contractors ensures that any issues which may be considered a Health & Safety Risk/Hazard are identified and addressed swiftly and efficiently.

With our full management package, we will ensure all your obligations will meet both current & pending legislation, and that you can be assured that anyone residing in the property can do so in a safe environment.

We also recommend that a full risk management assessment is undertaken annually by an independent H&S contractor on each of our managed properties.

ARRANGEMENT OF FIRE SAFETY INSPECTIONS;

Compliance with the Regulatory Reform (Fire Safety) Order 2005 is mandatory.

We will ensure that all aspects are met in full including completion of annual Fire Risk Assessments (FRA) periodic fire alarm service, emergency lighting, and provision firefighting Equipment etc.

CAN A PROPERTY KEEP ITS CURRENT CONTRACTORS?

Yes, if you have a good working relationship with your current contractors we are more than happy for them to continue provided their work is to our expected high standards and that they maintain adequate insurance for their trade.

ARRANGEMENT OF SURVEYS;

We can also arrange for the communal areas of the building to be surveyed under the Control of Asbestos at Work Regulations (CAW) 2002.

MAJOR ITEMS OF EXPENDITURE;

In the event that any works are required which exceed £250.00 per unit, then it is necessary to undertake a leaseholder consultation procedure (as defined by S20 of the 1985 Landlord & Tenant Act as amended by s151 of the Commonhold & Leasehold Reform act 2002) commonly referred to as a "Section 20".

Due to the administration & time associated with this procedure this is the only element of our 'full management package' which carries an additional fee.

As a result, if it is necessary to undertake any project which reaches the "Section 20" threshold, then we would consult you to agree any likely costs in advance and obtain full authorisation in full before any work takes place.

SITE VISITS;

We will undertake regular scheduled property inspections both internally & externally to identify any issues which need attention.

OTHER INFORMATION;

COMPANY SECRETARIAL DUTIES;

There are no additional fees for this service as it is included in our full management package.

MEETINGS;

The arrangement & attendance of residents meetings, Annual General Meetings (AGM's) Extraordinary General Meetings (EGM's) is included in our full management package.

DATA PROTECTION ACT;

Under the provisions of the Data Protection Act 1998 (as amended by the Data Protection Act 2003) the information which you supply to Property Management Solutions will be used by Property Management Solutions for administrative purposes only.

The Data Protection Act 1998 (as amended by the Data Protection Act 2003) entitles certain persons to receive copies of data held on our company files.

INSTALLATION OF SATTTELITE TELEVISION AERIALS;

- No installation of any satellite television aerials is to be carried out without prior written permission from the Property Management Solutions, the Freeholder & Landlord. Failure to comply with these requirements may result in the lessee having to remove or re-site the dish at their own expense.
- A request in writing must be submitted by the lessee to Property Management Solution's the Freeholder & Landlord. This must include details of position, size, satellite supplier and the intended route of any cables.
- The lessee will be held responsible for any damage caused by the installer along with the cost of any repair to make good said damage. Along with ensuring the exterior of the building is restored should the dish be removed.



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- The lessee is solely responsible for the maintenance on any device installed.
- If a communal system is installed at the property, the lessee may be required to remove any device they have had installed.
- It remains the sole responsibility of the lessee to obtain any required council planning permission.
- The lessee is solely responsible for obtaining Council planning permission.

COMPLAINTS PROCEDURE;

We aim to provide you with a high level of customer service at all times, however if your are unhappy with any aspect of our service please write to Mr. Paul Mallorie, Director, Property Solutions (Southern) Limited in the first instance who will try to resolve any issue as swiftly as possible. A more formal complaints procedure can be found in our complaints policy available on our website or direct from our office.

ZERO TOLERANCE POLICY;

We would respectfully remind all our clients that Mallorie Estates operates a zero tolerance policy with regard to any form of abuse directed toward our staff. We will not accept bad language, shouting or any other form of physical, written or verbal abuse.

We will treat all of our clients with courtesy and respect and ask the same to be returned. If any threatening behaviour is received from any lessee (or person acting on behalf of any lessee) we reserve the right to only communicate in writing.

