

CORE Sales Log 2015/16

STRICTLY CONFIDENTIAL

LOG SIGNATURES / INITIALS

For RP use only

Purchaser code

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

DATE OF COMPLETION OF SALE (e.g. 13/04/15)

| | | |
|-----|-------|------|
| Day | Month | Year |
| | | |

PART A: HOUSEHOLD DETAILS

Complete for ALL sales types.

✓ one only

Purchaser(s) should be informed of use and permission sought at interview.

Please tick one if applicable:

- Purchaser(s) refused to answer some or all questions in Part A
- Purchaser(s) not interviewed

1. HOUSEHOLD CHARACTERISTICS

Enter all demographic details required for person 1. Enter age, sex, relationship to person 1 and economic status for all other household members. If joint purchaser, enter most economically active purchaser first.

| | Age | Sex M/F | Relationship to person 1 | Economic status | Ethnicity | Nationality |
|----------|-----|---------|--------------------------|-----------------|-----------|-------------|
| Person 1 | | | n/a | | | |
| Person 2 | | | | | | |
| Person 3 | | | | | | |
| Person 4 | | | | | | |
| Person 5 | | | | | | |
| Person 6 | | | | | | |

PLEASE ENTER RELEVANT CODE. PLEASE REFER TO CODE LISTS BELOW *
 Relationship to person 1
 P = Partner
 C = Child (eligible for child benefit, under 16, or under 20 if still in full-time education)
 X = Other

CODE LISTS *

- Economic status**
- | | |
|--|--|
| 1 Full time work (30 hrs or more per week) | 4 Job seeker |
| 2 Part-time work (less than 30 hrs per week) | 5 Retired |
| 3 Government training/ New deal | 6 Not seeking work |
| | 7 Full-time student |
| | 8 Unable to work because of long term sickness or disability |
| | 9 Child under 16 |
| | 0 Other adult |

- Ethnic Group**
- | | | |
|---|--|------------------------------|
| A. White | C. Asian or Asian British | E. Other ethnic group |
| 1 English, Scottish, Welsh, Northern Irish, British | 8 Indian | 19 Arab |
| 2 Irish | 9 Pakistani | 16 Other |
| 18 Gypsy, Irish Traveller | 10 Bangladeshi | Refused |
| 3 Other | 15 Chinese | 17 Refused. |
| B. Mixed | 11 Other | |
| 4 White & Black Caribbean | D. Black, African, Caribbean or Black British | |
| 5 White & Black African | 12 Caribbean | |
| 6 White & Asian | 13 African | |
| 7 Other | 14 Other | |

- Nationality**
- | | | |
|---|--|---|
| 1 UK national resident in UK | 10 Slovenia | * Other EEA countries are Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, Malta, Netherlands, Portugal, Spain, Sweden, Iceland, Liechtenstein, Norway and Switzerland |
| 2 UK national returning from residence overseas | 14 Bulgaria | |
| 3 Czech Republic | 15 Romania | |
| 4 Estonia | 16 Croatia | |
| 5 Hungary | 17 Ireland | |
| 6 Latvia | 11 Other EU Economic Area (EEA*) country | |
| 7 Lithuania | 12 Any other country | |
| 8 Poland | 13 Refused | |
| 9 Slovakia | | |

PLEASE NOTE: Housing Associations (HA) and Local Authorities (LA) are now referred to as Registered Providers (RP). HA's are separately referred to as Private Registered Providers (PRP)

2. **GROSS annual income** (include income from investments and benefits or Universal Credit, but exclude housing benefit and council tax support - to the nearest pound)

✓ If income used for mortgage application

Person 1 £

| | | | | | |
|--|--|--|--|--|--|
| | | | | | |
|--|--|--|--|--|--|

Person 2 £

| | | | | | |
|--|--|--|--|--|--|
| | | | | | |
|--|--|--|--|--|--|

3. Total savings of purchaser(s) before any deposit is paid

To nearest £10 £

| | | | | | |
|--|--|--|--|--|--|
| | | | | | |
|--|--|--|--|--|--|

4. Have any of the purchasers previously owned a property?

Yes 1 No 2 Don't know 3

5. Is the purchaser (or one of the purchasers) a member of the British regular armed forces or have they been discharged in the last 12 months?

Yes 1 No 2

6. Previous tenure of person 1

✓ one only

- Local authority tenant 1
- Private Registered Provider (HA) tenant 2
- Private tenant 3
- Owner occupier 5
- Tied home / renting with job 4
- Living with family / friends 6
- Temporary accommodation 7
- Other 9

7. Previous location of person 1

Name of local authority

ONS LA code

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Full postcode

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

If postcode not known tick

8. Which organisation(s) were the purchaser(s) registered with for re-housing? **Tick ALL that apply**

Your PRP (HA) Local Authority Help to Buy Agent Other PRP (HA)

9. Does any household member consider him / herself to have a disability?

Yes 1 No 2 Don't Know 3

10. Does any member of the household use a wheelchair?

Yes 1 No 2 Don't Know 3

PART B: PROPERTY DETAILS TO BE COMPLETED FOR ALL TYPES OF SALES ABOUT THE PROPERTY BEING PURCHASED

11. Number of bedrooms

12. Property type one only
 Flat / maisonette 1 House 3 Other 9
 Bedsit 2 Bungalow 4

13. Building type one only
 Purpose built 1
 Converted from previous residential or non-residential 2

14. Property Location
 Name of local authority ONS LA code

Full postcode

15. Is the property built / adapted for wheelchair standards?
 Yes 1 No 2 Don't know 3

PART C – COMPLETE ONLY ONE SECTION – EITHER SECTION 1, 2 OR 3

SECTION 1: SHARED OWNERSHIP SCHEMES

16. TYPE OF SALE one only
 Shared Ownership 2
 Older Persons Shared Ownership 24
 Social HomeBuy (shared ownership purchase) 18
 Home Ownership for people with Long Term Disabilities (HOLD) 16
 Rent to HomeBuy 26

17. Is this a resale? Yes 1 No 2

18. Key Dates LEAVE KEY DATES BLANK FOR REALES

| | Day | Month | Year |
|--------------------------------------|----------------------|----------------------|----------------------|
| Practical completion / handover date | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Exchange of contracts date | <input type="text"/> | <input type="text"/> | <input type="text"/> |

19. Was the household rehoused under an LA Nominations Agreement?
 (please see manual for definition)
 Yes 1 No 2 Don't know 3

IF THE PURCHASER WAS AN RP (HA / LA) TENANT GIVE DETAILS OF PROPERTY BEING VACATED (QUESTIONS 20 & 21)

20. Number of bedrooms

21. Property type one only
 Flat / maisonette 1 House 3 Other 9
 Bedsit 2 Bungalow 4

22. Full Purchase Price (market value before any discount) £

23. Initial % equity stake purchased %

24. Amount of mortgage £

25. Does this include any extra borrowing?
 Yes 1 No 2 Don't know 3

26. Cash deposit paid on property (full cash amount paid by purchaser) £

27. Cash amount of discount given for Social HomeBuy £

MONTHLY HOUSING COSTS (Excluding mortgage payments)

28. Basic monthly rent (rent element only) £

29. Monthly charges (include service charges, management charges, exclude rent) £

SECTION 2: FULL OWNERSHIP SCHEMES

30. TYPE OF SALE one only
 Right to Acquire (RTA) 8
 Right to Buy (RTB) 9
 Preserved Right to Buy (PRTB) 14
 Social HomeBuy for outright purchase 21
 Any other Equity loan scheme 22

31. Full purchase price (market value before any discount) £

32. Loan / grant / discount / subsidy given (all schemes apart from RTB & PRTB) £

33. Enter % discount given (RTB & PRTB) (if discount capped, enter capped %) %

34. Amount of mortgage £

35. Does this include any extra borrowing?
 Yes 1 No 2 Don't know 3

36. Cash deposit paid on property (exclude any grant or loan) £

37. Monthly charges (where applicable i.e. leasehold, include service and management charges) £

SECTION3: OUTRIGHT SALES / OTHER SALES

38. TYPE OF SALE one only
 Outright sales (New build or converted) 10
 Other sale 12
 If Other sale please enter type of scheme:

39. Number of weeks vacant

40. Full purchase price (market value before any discount) £

41. Amount of mortgage £

42. Does this include any extra borrowing?
 Yes 1 No 2 Don't know 3

43. Cash deposit paid on property (Full cash amount paid by purchaser) £

44. Monthly charges (where applicable i.e. leasehold, include service and management charges) £