

# Leaseholder Support Scheme

## Application Form

[www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme)

## Confidential

Before applying for the Leaseholder Support Scheme, please ensure you have read the guidance and carried out the initial eligibility assessments which can be found at [www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme)

Please complete the following sections:

**Section 1:** Personal details

**Section 2:** Eligibility

**Section 3:** Additional Information and Declaration

**Section 4:** Application checklist

Guidance notes are provided in section 5 to support completion of your application. If you require additional support, please email [applications@leaseholdersupportscheme.wales](mailto:applications@leaseholdersupportscheme.wales)

### ***Please note that:***

- 1 To minimise delay in your application being processed, please ensure that all sections are filled in and completed with the appropriate boxes ticked, and all relevant documents are provided. Any applications missing this information will be returned and may result in delays.*
- 2 If completing by hand, please complete all sections in full using BLOCK CAPITALS in the relevant boxes.*
- 3 This Leaseholder Eligibility Application Form will be processed and managed by the Development Bank of Wales on behalf of the Welsh Government Leaseholder Support Scheme. Please review the Leaseholder Support Scheme [Privacy Policy](#) for further detail on how the Development Bank of Wales will process and store your personal data.*

Please submit this completed Leaseholder Support Scheme Application Form along with the required documents by email to:

Email: [applications@leaseholdersupportscheme.wales](mailto:applications@leaseholdersupportscheme.wales)

Or by post to:

**Leaseholder Support Scheme  
1 Capital Quarter  
Tyndall Street  
Cardiff  
CF10 4BZ**

For any questions in relation to your completion of this application, please email: [enquiries@leaseholdersupportscheme.wales](mailto:enquiries@leaseholdersupportscheme.wales)

## SECTION 1: PERSONAL

### 1.1 Personal details

Please provide details of each of the applicants applying to the scheme. This should include all individuals listed on the mortgage or deeds of the property you wish to be considered by the Leaseholder Support Scheme. If there are more than two applicants, please provide details in Section 6: Additional information.

	Applicant 1	Applicant 2 (as applicable)
Title		
Forename		
Middle name(s)		
Surname		
Date of Birth		
Telephone number(s)		
E-mail address		
Correspondence address		
Number of dependants (under 14)		
Number of dependants (14-17)		
Number of financially dependent adults		

## SECTION 2: ELIGIBILITY

To be eligible for the Leaseholder Support Scheme you own a property in an eligible building and own you will be in - or facing - significant financial hardship due to the building fire safety issues.

Before filling out this application form you should have already completed an initial self-assessment online which has determined you may be eligible for the scheme. If you have not already completed this step, please visit [www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme) and complete the online assessment before proceeding with this application.

### 2.1 Building Eligibility

Your building must be 11m or more in height and have recognised fire safety issues which make the property unable to receive an accurate valuation for mortgage purposes. The recognised fire safety issues will have led to increased service charges which have been passed to you as the leaseholder.

### 2.2 Residential Eligibility

#### Building eligibility

##### MANDATORY INFORMATION:

<b>Building name and full address of the leasehold property</b>	
<b>Contact details of Managing Agent</b>	
<b>Service Charge statements showing increase incurred due to fire safety issues or notice that costs will be increasing.</b>	Please confirm if this has been included with your application form <input type="checkbox"/>

##### ADDITIONAL OPTIONAL EVIDENCE

<b>A B2/A3 rating as a result of your EWS1 form (may be available from your Managing Agent)</b>	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>Documented fire safety failings under the Fire Safety Order (2005) or the Housing Act (Wales) 2014</b>	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>Service Charge Statements from the last three years</b>	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>Evidence of lack of eligibility for re-mortgage due to fire safety issues</b>	Please confirm if this has been included with your application form <input type="checkbox"/>

You must provide evidence that you are the owner/occupier of the property. Please refer to the guidance in Section 5 for further information.

Residential eligibility	
<b>MANDATORY INFORMATION:</b>	
Please provide proof that you own the property (see guidance in Section 5)	Please confirm if this has been included with your application form <input type="checkbox"/>
Please provide proof that you own the property.	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>ADDITIONAL OPTIONAL EVIDENCE</b>	
If the property is rented, evidence of rental income received as a result of letting the property that's eligible for the scheme.	Please confirm if this has been included with your application form <input type="checkbox"/>

## 2.3 Financial Eligibility

To be considered in 'financial hardship' for this scheme you must be able to evidence that as a direct result of outgoings due to fire safety issues your disposable income puts you below the poverty line. For the purposes of this scheme this is defined as less than 60% of the median household monthly UK income after housing costs. For further information on how this is calculated please refer to the scheme guidance at [www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme). Below you are required to provide details of your **income after tax** and **property related outgoings** on a **monthly basis**. If there are multiple entries for any box, **please list separately** so they can be cross checked back to evidence submitted.

	Applicant 1	Applicant 2 (as applicable)
<b>INCOME</b>		
Net earnings from employment (take home pay)		
Profit or loss from self - employment		
Any state support including benefits and tax credits		
Any income from pensions both private and state		
Any investment income		
Any income from educational grants and scholarships		
Any maintenance payments you are receiving (e.g., child maintenance)		
Any other income		
<b>Total income</b>		
<b>PROPERTY RELATED OUTGOINGS</b>		
Mortgage repayment		
Home insurance		
Ground rent		
Service charges		
Council tax		
<b>Utility Bills</b> <ul style="list-style-type: none"> <li>• Water Rates (if not included in service charge)</li> <li>• Electricity</li> <li>• Gas</li> </ul>		

<b>Other property costs (see guidance in section 5)</b>	<i>Please provide details of what this is made up of:</i>	
<b>Total property related outgoings</b>		
<b>Average monthly income after property related outgoings</b>		

In order to verify the information provided above you are required to submit the below information.

<b>Financial eligibility</b>	
<b>MANDATORY INFORMATION:</b>	
<b>Bank statements from the previous three months showing income and outgoings</b>	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>Payslips from the previous three months</b>	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>Please ensure evidence is provided to verify all income and costs stated above</b>	Please confirm if this has been included with your application form <input type="checkbox"/>
<b>Any other appropriate information that will support your application particularly if income and outgoings declared above cannot be verified through your bank statements</b>	Please confirm if this has been included with your application form <input type="checkbox"/>  Please outline what additional information has been supplied:

## SECTION 3: ADDITIONAL INFORMATION AND DECLARATION

### 3.1 Language preference

Please select your preferred language for communication from the Leaseholder Support Scheme.

	Welsh	English
Applicant 1	<input type="checkbox"/>	<input type="checkbox"/>
Applicant 2	<input type="checkbox"/>	<input type="checkbox"/>

### 3.2 Where did you hear about the Leaseholder Support Scheme?

Please provide response:

### 3.3 How We Use Your Information

Please read the following section, and tick as appropriate the following confirmations and agreements in section 3.4.

This section sets out how the Development Bank of Wales on behalf of the Leaseholder Support Scheme will use the information provided in this application.

We process personal data you've provided to us in this application form solely to assess your eligibility to receive support from the Leaseholder Support Scheme, and to administrate and manage your application. We process this data on the basis that is in our legitimate interests to do so.

We will share your data with relevant organisations to process your application, including your chosen Independent Financial Adviser, RICS (Royal Institution of Chartered Surveyors) appointed surveyor, Welsh Government, purchasing authority e.g., Registered Social Landlord, Local Authority, and legal conveyancer.

In the event that any information you provide to us comprises of special category data, we will process this when it is in the substantial public interest to do so where this helps us to meet our broader social and vulnerable customer obligations, for example if you share data about your health with us. We will not share any special category data you provide to us with other parties.

Under data protection law, you have rights we need to make you aware of, including the following:

- **Right of access** – You have the right to ask us for copies of your personal data held about you.
- **Right to rectification** – You have the right to ask us to rectify inaccurate personal data about you, and also to ask us to complete information you think is incomplete.
- **Right to erasure** – In certain circumstances, you have the right to ask us to erase your personal data.
- **Right to object to processing** – In certain circumstances, you have the right to object to processing of your personal data.



- **Right to restrict processing** – In certain circumstances, you have the right to restrict processing of your personal data (for instance, if you think you require the data for the purpose of establish, exercise, or defend a legal claim)

The rights available to you depend on our reason for processing your data.

For more information on how and why we use your personal data, how long we will hold your personal data, as well as further information about your rights and how to exercise them, please see our Privacy Policy, a copy of which can be found at <https://developmentbank.wales/privacy-policy/LSS> or by contacting us at **Leaseholder Support Scheme, 1 Capital Quarter, Tyndall Street, Cardiff, CF10 4BZ.**

To understand more about your data rights, we recommend you visit the ‘Your Data Matters’ section on the [Information Commissioner’s Office \(ICO\) website.](#)

### 3.4 Confirmation and Agreements:

Please read the statements below and place a tick in the appropriate box to confirm that you have read and agree with each of the statements.

I/we confirm that all of the information contained in this application form or otherwise supplied by me in support of my application under the Leaseholder Support Scheme is, to the best of my knowledge true, accurate, complete, up to date and not misleading.	<input type="checkbox"/>
I/we are aware that you will rely on the truth, accuracy and completeness of the information provided by me when processing my application to participate in the Scheme.	<input type="checkbox"/>
I/we acknowledge that if any information I/we give you is incorrect or misleading you may withdraw any offer made by you for me to participate in the Scheme and that you will liaise with the relevant fraud prevention agencies as appropriate.	<input type="checkbox"/>
I/we agree to let you know if any of my circumstances change at any time.	<input type="checkbox"/>
I/we have read and agree to the Leaseholder Support Scheme Terms and Conditions and <a href="#">Privacy Policy.</a>	<input type="checkbox"/>

### 3.5 Declaration:

I/we confirm that I/we have read the confirmation and agreements in section 3.4 and acknowledged my/our agreement with each of the statements.

Applicant 1	Applicant 2 (as applicable)
Signed:	Signed:
Print name:	Print name:
Date:	Date:

**PLEASE NOTE ACTION MAY BE TAKEN AGAINST ANYONE KNOWINGLY SUPPLYING FALSE OR MISLEADING INFORMATION, INCLUDING THE REPAYMENT OF COSTS INCURRED BY THE SCHEME.**

## SECTION 4: CHECKLIST

Please ensure you have included the following information as part of your application before submitting to avoid any unnecessary delays.

Question	Requirement	Y/N
	You have previously completed the online eligibility checker at <a href="http://www.gov.wales/leaseholder-support-scheme">www.gov.wales/leaseholder-support-scheme</a>	
<b>1.1</b>	Details of all individuals listed on the deeds of the property being put forward	
<b>2.1</b>	Building Eligibility evidence:	
	Building name and address provided	
	Contact details for Managing Agent	
	Service Charge statements showing increase incurred due to fire safety issues or notice that costs will be increasing	
<b>2.2</b>	Residential Eligibility evidence:	
	Proof of property ownership	
<b>2.3</b>	Financial Eligibility	
	Bank statements for the previous three months for all applicants	
	Any other evidence required to verify costs and income declared	
<b>3.1</b>	Preferred language selected	
<b>3.2</b>	Detail provided of where you heard about the scheme	
<b>3.3</b>	Each applicant has read the 'How we use your information' section.	
<b>3.4</b>	Each applicant has read and agreed to the confirmation and agreements	
<b>3.5</b>	Each applicant has read, signed, and dated the declaration	

## SECTION 5: GUIDANCE

The following information provides additional guidance on completion of the questions set out in Sections 1-3 (inclusive) of this Leaseholder Support Scheme Application Form. For wider scheme information please refer to the Leaseholder Support Scheme Guidance document available at [www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme)

### SECTION 1: PERSONAL DETAILS

- 1.1 Personal details-** applicants listed must be the registered owner of the property being put forward for consideration. All registered owners must be included in the application. We only require number and age of dependents - please do not submit names or any other additional information. This will help in the assessment of disposable income as explained further at [www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme)

### SECTION 2: ELIGIBILITY

- 2.1 Building Eligibility-** Don't worry about knowing the exact height of your building, the online eligibility assessment will have undertaken the first stage building eligibility check and established that your building is eligible from the details you submitted. The information provided in this section will allow us to verify the building eligibility to continue with the scheme.

#### **Mandatory information:**

**Building name and address-** Please provide the full name and address of the property so we can verify building eligibility. This must include the postcode.

**Managing agent-** Please provide details of the building Managing Agent. This will allow us to obtain further building related information to assess eligibility if required.

**Service Charge statements-** Please include to your application form copies of your service charge statements showing the uplift of additional costs related to fire safety issues.

#### **Additional Optional evidence:**

You may also provide additional optional evidence as noted in order to speed up your application if this is available to you.

- 2.2 Residential Eligibility-** You must be able to evidence that you are the owner-occupier of the leasehold property submitted in 2.1. **Mandatory information**

**Proof of property ownership-** Please provide evidence of property ownership. This may be a mortgage statement or a copy of the property deeds. This information should name all individuals that own the property and link to the applicants included on this application form.

#### **Additional optional evidence**

**Rental income received from the letting of the property-** You may submit details of the income received in letting the property.

We may also undertake additional checks to confirm eligibility. These may include, but are not limited to, checking the address on Rent Smart Wales and a digital survey of the building.

- 2.3 Financial Eligibility-** You are required to provide details of your income and outgoings on a monthly basis. You will be eligible from a financial perspective if your disposable income is less than or equal

to 60% of the median household UK monthly income after housing costs. Further details of how this is calculated can be found at [www.gov.wales/leaseholder-support-scheme](http://www.gov.wales/leaseholder-support-scheme)

**Income-** Please provide details of all income received by each applicant. For income that is not monthly please refer to the conversion table below.

**Outgoings-** Please provide details of all property related outgoings for the household.

For **other property costs** please include water rates if not part of the service charge. You may also include, for example, repayment of any loans taken out to pay for extra costs incurred directly due to fire safety issues (e.g., contribution to previous remediation works). Do not include loans taken out for other purposes.

All declared income and costs will need to be verified through the provision of bank statements or other documentation.

To help you work out your income and costs if they're not paid to you on a monthly basis, please follow the table below to convert the payments into a monthly figure:

Payment Frequency	Formula to Convert to Monthly Basis
Weekly	x 4.35
Every 2 Weeks	x 2.175
Quarterly	÷ 3
Annually	÷ 12

#### **Mandatory information:**

**Bank statements-** Each applicant must provide a minimum of the latest 3 months bank statements. These bank statements must clearly show the income and outgoings declared in section 2.3. If they do not, please provide additional supporting information to ensure smooth processing of your application.

**Additional evidence-** You may provide further additional evidence to support the information provided in the income and outgoings section. This may be in the form of a recent P60, payslips from the last three months, or anything else that you believe will support your application.

### **SECTION 3: ADDITIONAL INFORMATION AND DECLARATION**

- 3.1 Language preference-** Please indicate your preferred language for communication.
- 3.2 How did you hear about the scheme-** Please enter where you first heard about the Leaseholder Support Scheme.
- 3.3 How we use your information-** Please read this section carefully as this section explains how we use your personal data. For further information on this topic please see our [Privacy Policy](#).
- 3.4 Confirmation and agreements-** Please read and place a check as appropriate in each box of the confirmation and agreements.
- 3.5 Declaration-** Each applicant must sign agreement in the box provided. If you are unable to insert an electronic signature, please just print your name in both the 'Signed' and 'Print name' entries. If there are more than two applicants, please provide declarations for additional applicants in Section 6.

## **SECTION 6: ADDITIONAL INFORMATION**

Please provide any additional information required in response to the questions outlined in Section 1, Section 2, and Section 3. Please clearly mark which question the information provided relates to.

