**First Homes/Discounted Market Homes – Eligibility**

**Application Form**

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| **Property to be Purchased (plot number on scheme or address if known):** | |
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| **Number of bedrooms in Property:** | **Type of Home:**  First Home 🞏  Discounted Market Home 🞏 |
| **House Style** (usually given a marketing name, e.g. ‘the Windsor’): | |
| **Full Market Price of Property:** | **Discounted Price of Property:** |
| **Housebuilder:** | |
| **Contact email for housebuilder:** | |
| **Mortgage/Home purchase plan provider:** | |
| **Contact email for Mortgage/Home purchase plan provider:** | |

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| **First Applicant Name:** |  |
| **Current address:** |  |
| **Type of Tenure of Current Home (e.g. private rent, social rent, living with parents etc):** |  |
| **Contact email:** |  |
| **Will this be the first time that you have purchased a home\*** | **Yes/No** |

\*A purchaser (or, if a joint purchase, all the purchasers) of a First Home should be a first-time buyer as defined in paragraph 6 of schedule 6ZA of the Finance Act 2003 for the purposes of Stamp Duty Relief for first-time buyers (national criteria). This applies to both members of a couple, even if only one person is taking out the mortgage. This does not apply to a discounted market property.

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| **Second Applicant (if applicable):** |  |
| **Note – you should include details of a second person in a couple, if they are intending to live in the property as their main home, even if they are not jointly taking out the mortgage.** | |
| **Current address:** |  |
| **Type of Tenure of Current Home:** |  |
| **Contact email:** |  |
| **Will this be the first time that you have purchased a home\*** | **Yes/No** |

\*A purchaser (or, if a joint purchase, all the purchasers) of a First Home should be a first-time buyer as defined in paragraph 6 of schedule 6ZA of the Finance Act 2003 for the purposes of Stamp Duty Relief for first-time buyers (national criteria). This applies to both members of a couple, even if only one person is taking out the mortgage. This does not apply to a discounted market property.

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| **Gross Income of Household (combined of applicants/couple)**  Note, this should include the total household of both members of a couple intending to occupy the home, even if only one person is taking out the mortgage. | |
| **Total Gross Annual Income\*:** |  |
| **List evidence provided:** |  |

\*Purchasers of First Homes/Discounted Market Homes, whether individuals, couples or group purchasers, should have a combined annual household income not exceeding £60,000 in the tax year immediately preceding the year of purchase.

**Note – evidence should be provided that demonstrates that the household income of the named purchaser(s) does not exceed £60,000. This could include wage slips, bank statements, letter from an employer, P60 etc.**

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| **Will the house be purchased with at least 50% mortgage or home purchase plan\*?** | **Yes/No** |
| **How much deposit will the purchaser(s) be putting down?** |  |
| **List evidence provided:** | |
| **Who is the proposed mortgage lender?** | |
|  | |

\*A purchaser should have a mortgage or home purchase plan (if required to comply with Islamic law) to fund a minimum of 50% of the discounted purchase price.

**Note – evidence should be provided to show that a mortgage or home purchase plan will fund at least 50% of the discounted purchase price. This could be the ‘agreement in principle’ from your mortgage provider.**

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| **What are the total incentives (if applicable) being offered on the property -** as set out in the UK Finance Disclosure of Incentives Form and not to exceed 5% of the Purchase Price. These must include all financial and non-financial incentives provided by the builder |
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| **Local Connections (one of the following must apply to one of the applicants)\*** | |
| Have one of the applicants lived in the Sefton area for 6 months out of the last 12 months or 3 years out of the last 5 years? | **Yes/No** |
| Have one of the applicants a permanent job in Sefton? | **Yes/No** |
| Have one of the applicants a minimum of a 12-month contract of employment in Sefton or have been working for a continuous period of 6 months in Sefton? | **Yes/No** |
| Have one of the applicants a close family association (parent, child or brother/sister) who is currently living in Sefton and has done so for more than 5 years? | **Yes/No** |
| Is one of the applicants a key public sector worker in the health and social care, emergency services or education sectors? | **Yes/No** |
| Is one of the applicants is a member of the armed services or has been within the past 5 years? | **Yes/No** |
| **List evidence provided:** |  |

\*At least one the purchasers/member of couple should meet one of the above criteria

**Note – evidence should be provided that clearly demonstrates that one of the above apply.**

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| **Matching the house to needs\*** | |
| How many people (adults or children) will be living at the house? |  |

\*The number of bedrooms in the home should match the needs of the prospective occupiers, using the following criteria:

* 1 or 2 bedroom – one person or more
* 3 bedroom – at least two people (including children)
* 4+ bedroom – at least three people (including children)

**Applicant Confirmation**

We have fully completed this First Homes/Discounted Market Home application and obtained and enclosed (as applicable) all the supporting evidence. We confirm that all the information provided is correct.

Signed (first applicant): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed Name (first applicant): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed (second applicant): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed Name (second applicant): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Once signed, please submit to the developer/housebuilder/estate agent through which you are purchasing the home. They will check the application and supporting evidence before they send completed form to the Council for confirmation.

**Developer/Estate Agents Confirmation**

We confirm it is a complete application and the homebuyer(s) meet all the eligibility requirements of Sefton MBC and the First Homes/Discounted Market Homes scheme. This is based on the information submitted to us with which we have used our best endeavours to verify as correct. We are recommending it to Sefton MBC to issue its First Homes/ Discounted Market Homes ‘Authority to Proceed’ and Eligibility Certificate.

[note – you do not need to send the supporting evidence to the Council to support this application. However, the Council reserves the right to request any information to confirm any part of the eligibility test).

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On behalf of (housebuilder/estate agent): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Please submit by email to [local.plan@sefton.gov.uk](mailto:local.plan@sefton.gov.uk). The Council will endeavour to respond to this application within 10 working days unless additional information is required.