



Notice claiming the Right to Shared Ownership (RtSO1 form)

Please use this form if you are a housing association tenant (or tenant of another Registered Provider of Social Housing that is not a local authority, co-operative housing association or Community Land Trust) and wish to use the Right to Shared Ownership to purchase an equity stake in your current home.

The Right to Shared Ownership also does not apply to almshouses, homes built on rural exception sites or in Designated Protected Areas, and specialist homes for older, disabled and vulnerable people.

Although they cannot be accessed through the Right to Shared Ownership, specialist homes for older, disabled and vulnerable people are available on Shared Ownership terms through the Older Persons Shared Ownership (OPSO) and Home Ownership for People with Long-Term Disabilities (HOLD) schemes.

You could be eligible for the Right to Shared Ownership if you:

- ✓ are aged 18 and over
- ✓ live in a home where the Right to Shared Ownership applies
- ✓ hold an un-demoted secure tenancy, an assured tenancy (including an assured shorthold tenancy), or a Localism Act fixed-term tenancy (either an assured shorthold tenancy or a flexible secure tenancy with a fixed-term of a minimum of two years)
- ✓ have lived in your current home for at least 12 months
- ✓ have been a tenant of social or affordable housing for at least three years (this need not have been with same landlord, or for a continuous period)
- ✓ are not in rent arrears
- ✓ are not subject to a court order for the possession of your home
- ✓ are not subject to bankruptcy proceedings or unfulfilled credit arrangements
- ✓ are not subject to legal proceedings e.g. a notice of seeking possession has been served

- ✓ are not subject to legal proceedings on the grounds of anti-social behaviour
- ✓ satisfy all standard eligibility criteria for the Shared Ownership scheme including its income requirements (currently a gross annual household income of £80,000 or less outside of London, or £90,000 or less in London), and do not already own a property
- ✓ are otherwise unable to purchase a property suitable to meet your housing needs on the open market
- ✓ satisfy immigration requirements.

Applying to buy an equity stake in a home through Shared Ownership is a big decision. If you haven't done so already, you should get impartial financial and legal advice before acquiring an equity stake.

You can get free general information and advice from:

- GOV.UK
- Your landlord
- For budgeting and financial advice, contact Money Helper: 08000 138 7777; www.moneyhelper.org.uk/en

When you have completed this form, please return it to your landlord.

You should contact your landlord to find out the best way to return your completed form. You may be able to return it to your landlord via email. If you post a hard copy to your landlord, please do this via recorded delivery. If you deliver it to your landlord by hand, ask for a receipt. You should keep a copy of the completed form for your records.

Please note:

- Completing this form does not guarantee that you will be eligible for the Right to Shared Ownership. Your landlord will advise you in writing on whether you are eligible.
- If you are currently in the process of purchasing your home under the Right to Acquire or Voluntary Right to Buy you cannot proceed with acquiring an equity stake under the Right to Shared Ownership unless you withdraw your other claim.
- This form must be completed accurately and in full. Any missing information may delay your application.
- Your landlord will assess the information provided in your application against their own records to determine your eligibility for the Right to Shared Ownership. They will, for example, check to make sure you are not in rent arrears and that there are no relevant legal proceedings ongoing – e.g. that a notice seeking possession of your home has not been served.

Part A: The property

Note:

You can only claim the Right to Shared Ownership if you are a tenant of this property.

However, as outlined in Part B below, as a tenant you can make a joint application with:

- someone who shares your tenancy. You are a tenant if your name is listed as a 'tenant' in the tenancy agreement. Often "other occupants" are listed in the agreement and they do not have tenant status; and/or
- up to three family members who've lived with you in the home for at least the past 12 months. They do not need to be tenants of the home themselves.

Please provide details of the following:

Address of the property you wish to purchase an equity stake in (including postcode)

Name of your landlord

Part B: The tenant(s) and family member(s) wishing to exercise the RtSO with you

Notes:

Tenant:

1. You have the right to be a tenant if your name is listed as a 'tenant' in the tenancy agreement. Often "other occupants" are listed in the agreement and they do not have tenant status. If you are unsure whether you are a tenant, you should check with your landlord.
2. You can only claim the Right to Shared Ownership if the property is your only or main home.
3. The agreement of any tenant who does not wish to buy must be obtained before you can exercise the Right to Shared Ownership. To provide their consent, they should sign Part G of this form. Their tenancy will end once you've exercised the Right to Shared Ownership.

Family member:

1. You may exercise the Right to Shared Ownership with up to three family members over the age of 18. They must be a spouse, civil partner or wider family member, but do not have to be tenants themselves. Wider family members must have also lived in the property as their main home for at least the last 12 months.
2. If you are unsure whether someone qualifies as a family member for this purpose, you should check with your landlord. You can ask your landlord to allow family members who haven't lived with you for 12 months to share the Right to Shared Ownership with you, but your landlord does not have to agree to this.

Complete the information below for each tenant of the property, and then for any family member(s) who are not tenants but wish to exercise the Right to Shared Ownership with you:

Title	Full name	Do you wish to buy? (Y/N)	Only/main home? (Y/N)
Tenant 1		Yes	Yes
		No	No
Tenant 2		Yes	Yes
		No	No
Tenant 3		Yes	Yes
		No	No

Title	Full name	Relationship to tenant (e.g. son or daughter)	Do they wish to buy? (Y/N)	Have they lived in this property for the last 12 months (Y/N)	Only/main home? (Y/N)
Family member 1			Yes	Yes	Yes
			No	No	No
Family member 2			Yes	Yes	Yes
			No	No	No
Family member 3			Yes	Yes	Yes
			No	No	No

Part C – Qualification and income

Notes:

To be eligible for Shared Ownership, your household’s gross annual income must be £80,000 or less outside of London, or £90,000 or less in London. Gross annual income means the amount of income received per year before tax or other deductions.

Any assessment of household income for the purposes of exercising the Right to Shared Ownership should be based on the income of all members of the household whether they have joined the application or not.

An exception would be the income of children under 18 and any other household member(s) whose residence in the home is unlikely to be permanent.

Additional annual income from other sources should also be taken into account. This includes benefits, guaranteed maintenance, or other forms of income that you receive.

Capital, access to that capital, and any income generated by this capital will be taken into account. Capital assets could include savings, bonds, shares, land and any other assets or investments.

Amount	
Gross annual household income	

Part D - Tenancies

Notes:

You must have been a tenant of social or affordable housing for at least three years to be eligible for the Right to Shared Ownership.

You do not need to have spent the full three years in your present home or with your present landlord. Previous tenancies in social and affordable housing, including those with a branch of the armed forces, can also count towards your qualifying period.

Please give details of:

- Your current tenancy (if this tenancy has lasted for at least three years, you will not need to give details of any previous tenancies)
- Previous tenancies (where you intend these tenancies to count towards your qualifying period)
- You do not need to provide tenancy details for family members wishing to join your application
- Previous instances of home ownership
- You should also sign the “Authority to Disclose” form if you are claiming a previous tenancy with a different landlord so that they can be contacted by your current landlord to confirm the details you’ve provided.

Current tenancy

Property address (including postcode)		
Name of tenant 1		
Name of tenant 2		
Name of tenant 3		
Date tenancy started (MM/YYYY)		
Have you ever been known by any other name?	Yes	If 'Yes' - Give details
	No	

Previous tenancy details

Name of tenant

Landlord of the property (e.g.
name of housing association)

Property address
(including postcode)

Enter date tenancy
started (MM/YYYY)

Enter date tenancy
ended (MM/YYYY)

Previous tenancy details

Name of tenant

Landlord of the property (e.g.
name of housing association)

Property address
(including postcode)

Enter date tenancy
started (MM/YYYY)

Enter date tenancy
ended (MM/YYYY)

Previous tenancy details

Name of tenant

Landlord of the property (e.g.
name of housing association)

Property address
(including postcode)

Enter date tenancy
started (MM/YYYY)

Enter date tenancy
ended (MM/YYYY)

Previous tenancy details

Name of tenant

Landlord of the property (e.g.
name of housing association)

Property address
(including postcode)

Enter date tenancy
started (MM/YYYY)

Enter date tenancy
ended (MM/YYYY)

Previous tenancy details

Name of tenant

Landlord of the property (e.g.
name of housing association)

Property address
(including postcode)

Enter date tenancy
started (MM/YYYY)

Enter date tenancy
ended (MM/YYYY)

Previous tenancy details

Name of tenant

Landlord of the property (e.g.
name of housing association)

Property address
(including postcode)

Enter date tenancy
started (MM/YYYY)

Enter date tenancy
ended (MM/YYYY)

Previous home ownership details

Name of home owner 1

Name of home owner 2

Name of home owner 3

Property address
(including postcode)

Enter date ownership
started (MM/YYYY)

Enter date ownership
ended (MM/YYYY)

Previous home ownership details

Name of home owner 1

Name of home owner 2

Name of home owner 3

Property address
(including postcode)

Enter date ownership
started (MM/YYYY)

Enter date ownership
ended (MM/YYYY)

Authority to disclose

Please complete this form if you have claimed any tenancy with another landlord.

Name(s):

Current address (including postcode):

Date (DD/MM/YY):

I have provided details of previous tenancies in my application form for the Right to Shared Ownership (RtSO1) and I give consent for my landlord to request and receive any information relating to any previous tenancy I have claimed towards my qualifying period.

All tenants listed in Part D must provide their authority to disclose by signing below, even if they aren't joining this application to use the Right to Shared Ownership.

Tenants' signatures:

Signed (Tenant 1)

Signed (Tenant 2)

Signed (Tenant 3)

Part E – Tenant improvements

Notes:

When your home is valued, any improvements you have made to the property will not be included in the valuation. You should use this application form to give details of any improvements you have made which you think may affect the valuation. This could include central heating, double glazing, a fitted kitchen or a new bathroom suite.

The value of improvements will also be ignored where they were carried out by either:

- your predecessor in the same tenancy (including during a starter tenancy); or
- a family member who was an assured or starter tenant of the property immediately before you under a different tenancy.

Give the following details of any tenant improvements to the property (tick those that apply):

General decoration

Give details:

Flooring

Give details:

Kitchen fittings

Give details:

Bathroom fittings

Give details:

Garden landscaping

Give details:

Other

Give details:

Part F: Signatures

To the best of my/our knowledge and belief the information that has been provided on this form is true, complete and correct. I/we understand it is used in determining my/our eligibility for the Right to Shared Ownership.

I/we understand that if I/we give false or misleading information or I/we omit information for the purpose of gaining the Right to Shared Ownership, it may be regarded as a criminal offence and action could be taken against me/us including court action and the recovery of property.

To be completed by each tenant wishing to use the Right to Shared Ownership:

I claim the Right to Shared Ownership. To the best of my knowledge and belief the information given in this notice is true.

Tenant 1:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)

Tenant 2:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)

Tenant 3:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)

To be completed by each family member (who is not a tenant) exercising the Right to Shared Ownership:

I agree to share the Right to Shared Ownership. To the best of my knowledge and belief the information given in this notice is true.

Family Member 1:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)

Family Member 2:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)

Family Member 3:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)

Part G: Tenants not wishing to buy

Notes:

To be completed by each joint tenant not wishing to exercise the Right to Shared Ownership (your tenancy will end once the Right to Shared Ownership has been exercised).

I do not wish to claim the Right to Shared Ownership.

I agree to the applicants listed in Part F above exercising the Right to Shared Ownership.

Tenant 1:	Tenant 2:
Signature	Signature
Full name	Full name
Date (DD/MM/YYYY)	Date (DD/MM/YYYY)
Phone number	Phone number
Email address (optional)	Email address (optional)

Tenant 3:

Signature

Full name

Date (DD/MM/YYYY)

Phone number

Email address (optional)