



SENIOR CITIZEN RESIDENCES SCHEME

CHEERFUL COURT / JOLLY PLACE
NGAU TAU KOK TSEUNG KWAN O

Application Form

The completed application form must be mailed to Hong Kong Housing Society, General Post Office Box No. 13621, Hong Kong in an envelope marked “Senior Citizen Residences Scheme”.

Please read the Application Guide before completing this form.

January 2019

SENIOR CITIZEN RESIDENCES SCHEME

CHEERFUL COURT / JOLLY PLACE

FOR OFFICE USE ONLY	
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Applicant Particulars :

Name		Sex (M/F)	Date of Birth			Relationship	HK Identity Card No.				For Office Use	
Please use block letters (according to HK Identity Card)			Year	Month	Day		IC	A				
e.g.	SHEUNG CHUNG PAK					Applicant	IC	A	123456	(7)	S	R
		M	1928 / 08 / 02									
Applicant						Applicant	IC			()		
			/ /									
Joint-Applicant							IC			()		
			/ /									
						Average Monthly Income		\$				
						Total Assets		\$				

Home Address

Please fill clearly in **BLOCK LETTERS**

Home Address :

Points to note :

1. Please read through the eligibility criteria and details of the Scheme carefully before completing the application form.
2. Individual envelope is required for each application form. Each applicant should submit only one application and each person should not be included in more than one application. Any duplication will render disqualification of all the applications.
3. Hong Kong Housing Society reserves all rights not to accept any application.

HK Home Telephone No : _____

HK Day-time Contact Telephone No : _____

Correspondence Address

(If different from the above) Please fill clearly in **BLOCK LETTERS**

Correspondence Address :

Applicant's Signature :

Joint Applicant's Signature :

Date : _____ / _____ / _____
(YYYY / MM / DD)

Senior Citizen Residences Scheme

Cheerful Court / Jolly Place

Eligibility Criteria

Only accepts applications from singletons or couple/non-couple doubletons

<u>Singleton</u>	<u>Couple / Non-Couple Doubleton</u>
<ol style="list-style-type: none"> The applicant must be a singleton. <i>(Note I)</i> The applicant must be aged 60 or above prior to the date of the application. He/she must have resided in Hong Kong for 7 or more years, hold a Hong Kong Identity Card, have right of abode or stay in Hong Kong not limited by the Hong Kong Immigration Department. <i>(Note II)</i> <ol style="list-style-type: none"> Applicants aged 60 to 69 must have total assets of HK\$4.11 million to HK\$7.33 million. <i>(Note III)</i> Applicants aged 70 or above must have total assets of HK\$3.26 million to HK\$6.78 million. <i>(Note III)</i> Applications of applicants whose total assets fall short of the minimum amounts stated in (i) and (ii) above must be supported by a guarantor, who shall sign a Deed of Undertaking and Indemnity. <i>(Note III (iv))</i> Applicants who are currently enjoying any forms of housing benefits provided by the Government, the Hong Kong Housing Authority or the Hong Kong Housing Society are eligible for this Scheme. Any owner who has been allocated or has purchased a unit through the Housing Authority's Elderly Persons Priority Scheme or is subject to any housing conditions and thus cannot have his/her name deleted from the relevant registers of any existing subsidized housing unit is not eligible for this Scheme. <i>(Note IV)</i> 	<ol style="list-style-type: none"> A couple/non-couple doubleton must be made up of two individuals, including the applicant. <i>(Note I)</i> The principal and joint applicants must be aged 60 or above prior to the date of the application. They must have resided in Hong Kong for 7 or more years, hold Hong Kong Identity Cards, have right of abode or stay in Hong Kong not limited by the Hong Kong Immigration Department. <i>(Note II)</i> If the joint applicant is the spouse of the applicant, he/she must also be 60 years old on the closing date of application. He/she must hold a valid Hong Kong Identity Card. <i>(Note II)</i> <ol style="list-style-type: none"> Couple/non-couple doubleton applicants aged 60 to 69 must have total assets of HK\$6.17 million to HK\$11.00 million. In addition, each individual applicant must have total assets of at least HK\$3.085 million. <i>(Note III)</i> Couple/non-couple doubleton applicants aged 70 or above must consist of one member aged 70 or above and another aged over 60. They must have total assets of HK\$4.89million to HK\$10.20 million. In addition, each individual must have total assets of at least HK\$2.445 million. <i>(Note III)</i> Applications of applicants/joint applicants whose total assets fall short of the minimum amounts stated in (i) and (ii) above must be supported by guarantor(s), who shall sign a Deed of Undertaking and Indemnity. <i>(Note III (iv))</i> Applicants/joint applicants who are currently enjoying any form of housing benefit provided by the Government, the Hong Kong Housing Authority or the Hong Kong Housing Society are eligible for this Scheme. Any owner who has been allocated or has purchased a unit through the Housing Authority's Elderly Persons Priority Scheme or is subject to any housing conditions and thus cannot have his/her name deleted from the relevant registers of any existing subsidized housing unit is not eligible for this Scheme. <i>(Note IV)</i>

[In case of any uncertainties or disputes as to the interpretation of the Eligibility Criteria, the decision of the Hong Kong Housing Society shall be final and conclusive.]

Note I

Applicable to singletons only :

- (i) "Singleton" means anyone who is single, divorced or widowed, or any married person whose spouse is not residing in Hong Kong and is not a holder of Hong Kong Permanent Identity Card.
- (ii) Applicants who are divorced or widowed must produce certification of divorce, or the death certificate of his/her spouse.

Applicable to couple/non-couple doubletons and joint applicants only :

- (i) The applicants and joint applicants can be of any relationship and of either sex.
- (ii) A married applicant must make a joint application with his/her spouse, unless a death certificate of the spouse; or supporting documents which prove that his/her spouse requires long stay in nursing home or hospital; or valid certification of divorce are produced

Note II

Age and length of residence will be taken as evidenced by the relevant information on Hong Kong Identity Card of the applicant or records of the Immigration Department of the Hong Kong Special Administrative Region.

Note III

Total assets shall include the income and assets of all applicants and joint applicants.

- (i) The following will be included for computation of personal income :
 - (a) All income before tax including current basic salaries, wages and allowances, regular or temporary bonuses, commissions, pensions and all types of allowances, except old age allowances and disability allowances from the Comprehensive Social Security Assistance Scheme. Current basic salaries, wages and allowances, regular or temporary bonuses, commissions, pensions and allowances respectively mean the amounts earned from the current employment at the time of assessment. For irregular income or the irregular portion of total income, the average of the previous 12 months of current employment will be taken. Income includes life-long pension income before tax.
 - (b) All gross income derived from all landed properties in China, Hong Kong or overseas, vehicles owned by the applicants and joint applicants, before deduction of mortgage payments, taxes and other outgoings.
 - (c) All gross income/profits derived from any business in Hong Kong, China or overseas, operated or owned by the applicants and joint applicants, before deduction of taxes :
 - Applicants and joint applicants holding business registration certificates or operating un-incorporated companies must furnish financial report(s) certified by independent certified public accountants and tax demand note(s) for the latest tax year, as evidence of income and assets. The financial report(s) must cover a period of 12 months (with the exception of newly established businesses) ending no more than 3 months from the date of the interview.
 - Applicants and joint applicants holding any shares in limited company(ies) (excluding shares in listed companies) must furnish audited financial report(s) in respect of the relevant company(ies), and tax demand note(s) for the latest tax year, as evidence of income and assets. The audited financial report(s) must cover a period of 12 months (with the exception of newly established businesses) ending no more than 6 months from the date of the interview.
- (ii) The following (including assets held in China, Hong Kong or overseas) will be included for computation of assets :
 - (a) Residential properties and non residential properties (deducting the amount of mortgage loans).
 - (b) Land (including lease agreements, Letter A and Letter B entitlements).
 - (c) Stocks and shares at current value, vehicles (including private and commercial vehicles).
 - (d) Transferable vehicle licenses (including taxi and public light bus licenses).
 - (e) Bank deposits.
 - (f) Unit trust funds.
 - (g) Assets of any business owned by the applicants.
 - (h) Assets held in any other forms.

Applicants and joint applicants will also be required to declare full details of all properties which are being held or were held by them in the capacity of trustee or in any capacity whatsoever.
- (iii) In any of the following circumstances, applicants and joint applicants will be deemed as owning real properties :
 - (a) having entered into an agreement for sale or purchase any real property; or
 - (b) beneficiaries of an estate of any deceased person, including any real property; or
 - (c) directly or indirectly holding, as beneficial owners, more than 50% issued shares in any company that owns real properties; or
 - (d) having any interest in any land.

The above circumstances are illustrated solely for the purpose of defining computable assets. The list is by no means exhaustive.

- (iv) Applicants and joint applicants should furnish proof of total assets. Those failing to meet the lower limit of total assets must have their applications supported by a guarantor, who shall execute the Deed of Undertaking and Indemnity to undertake all future outgoings incurred by the applicants in the residential unit granted under this Scheme. Proof of total assets shall be prepared as follows:

<u>Age</u>	<u>Singleton</u>	<u>Couple / Non-Couple Doubleton</u>
(1) 60-69	<p><u>Total assets under HK\$4.11 million</u></p> <ul style="list-style-type: none"> • Guarantor(s) required. • The number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. 	<p>(1) <u>Total assets of HK\$6.17 million to HK\$11.00 million</u></p> <ul style="list-style-type: none"> • If either the applicant or joint applicant has total assets of less than HK\$3.085 million, he/she shall procure : <ol style="list-style-type: none"> 1. guarantee by the other applicant signing this application form; or 2. third party guarantee. The number of third party guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. <p>(2) <u>Total assets under HK\$6.17 million</u></p> <ul style="list-style-type: none"> • If either the applicant or joint applicant has total assets of less than HK\$3.085 million, he/she must be guaranteed by guarantor(s). The number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. • If both the applicant and joint applicant have total assets of less than HK\$3.085 million, they must both be guaranteed by guarantor(s). If the applicant and joint applicant are guaranteed by different guarantors, the number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. If both the applicant and joint applicant are guaranteed by the same guarantor(s), the number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$84,000 or above. Proof of income is required.

(2) 70 or above	<u>Total assets under HK\$3.26 million</u> <ul style="list-style-type: none"> • Guarantor(s) required. • The number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. 	(1) <u>Total assets of HK\$4.89 million to HK\$10.20 million</u> <ul style="list-style-type: none"> • If either the applicant or joint applicant has total assets of less than HK\$2.445 million, he/she shall procure : <ol style="list-style-type: none"> 1. guarantee by the other applicant signing this application form; or 2. third party guarantee. The number of such third party guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required.
(3) 60-69 and 70 or above [Combination Doubleton (1)+(2)]	Not Applicable	(2) <u>Total assets under HK\$4.89 million</u> <ol style="list-style-type: none"> 1. • If either the applicant or joint applicant has total assets of less than HK\$2.445 million, he/she must be guaranteed by guarantor(s). <ul style="list-style-type: none"> • The number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. 2. • If both the applicant and joint applicant have total assets of less than HK\$2.445 million, they must both be guaranteed by guarantor(s). <ul style="list-style-type: none"> • If the applicant and joint applicant are guaranteed by different guarantors, the number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$76,000 or above. Proof of income is required. • If both the applicant and joint applicant are guaranteed by the same guarantor(s), the number of guarantors is not limited, provided the monthly income of one guarantor or the aggregate monthly income of two guarantors is HK\$84,000 or above. Proof of income is required.

Note IV

- (i) “Housing Benefits” beneficiaries include tenants of public housing estates operated by the Hong Kong Housing Authority, Hong Kong Housing Society and Hong Kong Housing Corporation Limited; registered owners of units purchased under the Single Elderly Persons Priority Scheme; registered owners/household members of units purchased under the Elderly Persons Priority Scheme; Rent Allowance for Elderly Scheme beneficiaries; licensees of interim housing, temporary housing areas and cottage areas; owners/household members of residential units purchased under the Home Ownership Scheme, Private Sector Participation Scheme, middle income family housing estate — Melody Garden, secondary market flats of Home Ownership Scheme, Tenants Purchase Scheme, Buy Or Rent Option Scheme, Flat-For-Sale Scheme, Home Purchase Loan Scheme, Home Starter Loan Scheme, Home Assistance Loan Scheme, Sandwich Class Housing Loan Scheme and Sandwich Class Housing Scheme.

The above mentioned Schemes are purely examples for defining “housing benefits” stated in paragraph 4 of Eligibility Criteria. The list is by no means exhaustive.

- (ii) Elderly priority schemes include housing benefits offered by the Families with Elderly Persons Priority Scheme, Special Scheme for Families with Elderly Persons, and Families with Elderly Persons Priority Allocation/Priority Scheme.
- (iii) Applicants/joint applicants within the category stated in (i) above should, before submitting their application forms, make inquiries with the management offices of the housing estates they are now residing at about deleting their names from registers or terminating their existing tenancies/licences/housing benefits.

- (iv) Applicants/joint applicants within the category stated in (i) above who are owners/licencees of units operated by the Hong Kong Housing Authority/interim housing units must give notices to terminate their tenancies. They should vacate their existing units within 60 days after collecting keys to their Senior Citizen Residences Scheme units.
- (v) Applicants/joint applicants within the category stated in (i) above who are owners/joint owners of residential units purchased under any subsidized housing schemes must terminate their housing benefits within six months after collecting keys to their Senior Citizen Residences Scheme units. Terminating housing benefits means assigning their properties, surrendering their units to the Hong Kong Housing Authority, paying all due premium or repaying all outstanding loans in full. Failing the above, the Housing Society may terminate their Senior Citizen Residences Scheme tenancy and service agreement.
- (vi) Applicants/joint applicants who are authorized occupants in any tenancy/licence of any public housing estate units/interim housing units of the Hong Kong Housing Authority, or authorized occupants on the registers of residential units purchased under any subsidized housing schemes, must contact the management offices of the housing estates they are now residing at to have their names deleted from the registers within 60 days after collecting keys to their Senior Citizen Residences Scheme units. Failing the above, the Housing Society may terminate their Senior Citizen Residences Scheme tenancy and service agreement.

Application Processing and Letting Procedure

1. According to postal date of applications received, computer balloting will be carried out to assign priority number to each application. Applicants will be notified in writing individually of their assigned priority numbers. They can also make inquiries online or call our hotline 2839 7111.
2. Housing Society will interview applicants in accordance with their assigned priority numbers. Applicants must produce genuine information, and produce all necessary documents to verify his/her eligibility within a specified time frame. His/her application will not be entertained if he/she fails to provide relevant or sufficient information within the time frame.
3. Applicants/joint applicants apart from fulfilling the general eligibility criteria of this Scheme should also meet the minimum total assets limit and/or their guarantor(s) should meet the lower limit of aggregate monthly income as laid down by the Housing Society. The Housing Society shall review and adjust the lower limit of the total assets required from time to time. If the total assets of the applicants/joint applicants and/or the aggregate monthly income of their guarantor(s) could not meet the adjusted amount at the time of being vetted, the application will still be accepted if the amount of total assets and/or the aggregate monthly income fulfill the requirements at the time they submit the application. The Housing Society will notify the applicants the result in writing after completed vetting of their applications.
4. After confirming the eligibility of the applicants, the Housing Society will invite eligible applicants according to their priority numbers to make statutory declaration and to proceed with relevant formalities when vacant units are available for leasing. Couple/non-couple doubletons can only lease one bedroom units.

Method of Payment

Upon successfully leasing a unit, an applicant should execute the tenancy agreement and service agreement on the same day, and pay all related fees (including the entry contribution, sinking fund, legal fee for the tenancy agreement and service agreement, registration fee, plans fee, stamp duty, deposits and advance payment of monthly fees, Government rates) before collecting keys to his/her unit. All fees should be paid in cashier's orders.

Key Features of Cheerful Court / Jolly Place Tenancy Agreement

1. The selected unit must be occupied solely by the applicant, or by joint applicants as joint tenants. (If the spouse of the applicant is aged between 50 and 59, he/she will only be permitted to reside in the unit as a permitted occupier and will be required to pay the basic package fees during their stay in the unit.)
2. When executing the tenancy agreement, the tenant must concurrently execute a service agreement with the Housing Society.
3. Tenant must reside in the unit.
4. The tenant is responsible to pay the monthly management fee, rates and basic care fee in respect of the unit he/she occupies (*Note V*).
5. Based on a “user pays” concept, the tenant is responsible for the repairs and maintenance of the unit he/she occupies.
6. If a new tenancy agreement is executed due to change of lease entitlement, a new Deed of Undertaking and Indemnity or other instrument specified by the Housing Society must also be executed.
7. Upon the death of a tenant, the tenancy is ended. The estate administrator or next-of-kin may not take over the tenancy. In the case of joint tenants, upon the death of either of them, the other may continue to lease and occupy the unit.
8. No letting or sub-letting is allowed.
9. No person may reside in the unit unless with permission of the Operator/Housing Society, and subject always to the terms and conditions of the tenancy agreement.
10. Either the tenant or Housing Society may terminate the tenancy agreement by giving the other party at least 3 calendar months prior written notice. Service Agreement will be terminated simultaneously.
11. In accordance with the Residential Lease, if any amount is owing by the Tenant to the Landlord and the Operator, the Landlord shall be entitled to deduct from amounts payable by the Landlord to the Tenant the amounts so owing to the Landlord.
12. A tenant who has surrendered his/her Senior Citizen Residences Scheme lease entitlement may apply for housing benefits offered by the government, the Hong Kong Housing Authority and Hong Kong Housing Society, provided that he/she can meet the prevailing housing policy requirements and eligibility criteria.

Note V

The Housing Society shall adjust the monthly management fee and the basic care fee in line with inflation and market situation and be responsible for the financial results of the management operation.

Notes to Applicants Relating to the Collection of Personal Data

1. Purpose of Collection

The Personal data provided by applicants will be used for :

- a. assessing applicants' eligibility for the Senior Citizen Residences Scheme and other related issues; or
- b. providing news, special offers and services of the Senior Citizen Residences Scheme; or
- c. reference data for determining tenancy and operating arrangements; or
- d. market research materials for the Senior Citizen Residences Scheme.

The provision of personal data is on a voluntary basis but if the applicant does not provide sufficient personal data, the Housing Society may not be able to process his/her application, and the application may have to be rejected. Please ensure that the data provided are accurate. If there are any changes in the data provided, please notify the Housing Society immediately.

2. Transfer of Personal Data and the Categories of Assignees

The personal data provided by applicants will be made available to appropriate persons of the Housing Society on a need-to-know basis. Apart from this, they may only be disclosed to the parties listed below :

- a. The Operator, which shall seek reference from these data when determining tenancy and operating arrangements, and in defining the respective rights and obligations of the tenants and itself. These data are also reference materials for market research and social service studies pertaining the Senior Citizen Residences Scheme; or
- b. Third parties that provide service to the Senior Citizen Residences Scheme; or
- c. Government authorities, such as the Transport and Housing Bureau; or
- d. Persons/organizations the disclosure to whom is authorized by or consented to by applicants; or
- e. Persons/organizations the disclosure to whom is authorized or required by law.

3. Access to Personal Data

Applicants have the right of access to and correction of their personal data. The right of access includes the right to obtain a copy of the personal data subject to payment of a fee.

4. Enquiries

Enquiries concerning the personal data collected by the Housing Society and the request for access and correction should be addressed to :

Hong Kong Housing Society
Senior Citizen Residences Scheme Applications Section
G/F, Dragon Centre, 23 Wun Sha Street, Tai Hang, Hong Kong
Tel : 2894 3222 Fax : 2504 0867

Hotline enquiry service 2839 7111 / 2894 3222 Website : www.hkhs.com/sen

Notes :

- (1) The Hong Kong Housing Society is one of the public organizations under the ambit of the Independent Commission Against Corruption and Office of the Ombudsman.
- (2) This application form and its contents do not legally bind the Hong Kong Housing Society. The Hong Kong Housing Society accepts no responsibility for any loss caused by reliance on any content of this application form.
- (3) The Hong Kong Housing Society reserves the right to update any information contained herein as and when necessary without further notice.