

## Village Comparison Document

*Retirement Villages Act 1999 (Section 74)*

This form is effective from 1 February 2019

ABN: 86 504 771 740

## Alondra Residences, Nundah



### Important information for the prospective resident

- The Village Comparison Document gives general information about the retirement village accommodation, facilities and services, including the general costs of moving into, living in and leaving the retirement village. This makes it easier for you to compare retirement villages.
- The *Retirement Villages Act 1999* requires a retirement village scheme operator to:
  - provide a copy of the Village Comparison Document to a prospective resident of the retirement village within seven days of receiving a request
  - include a copy of the Village Comparison Document with any promotional material given to a person, other than through a general distribution (e.g. mail-out)
  - publish the Village Comparison Document on the village's website so that the document, or a link to it appears prominently on each page of the website that contains, or has a link to, marketing material for the village
- You can access a copy of this Village Comparison Document on the village website at [www.lutheranservices.org.au](http://www.lutheranservices.org.au) also by visiting <http://alondra.com.au/>
- All amounts in this document are GST-inclusive, unless stated otherwise where that is permitted by law.

### Notice for prospective residents

Before you decide whether to live in a retirement village, you should:

- Seek independent legal advice about the retirement village contract – there are different types of contracts and they can be complex
- Find out the financial commitments involved – in particular, you should understand and consider ingoing costs, ongoing fees and charges (which can increase) and how much it will cost you when you leave the village permanently
- Consider any impacts to any pensions, rate subsidies and rebates you currently receive
- Consider what questions to ask the village manager before signing a contract
- Consider whether retirement village living provides the lifestyle that is right for you. Moving into a retirement village is very different to moving into a new house. It involves buying into a village with communal facilities where usually some of the costs of this lifestyle are deferred until you leave the village. These deferred costs when you leave your unit may be significant.
- Seek further information and advice to help with making a decision that is right for you. Some useful contacts are listed at the end of this document, including:
  - Queensland Retirement Village and Park Advice Service (QRVPAS) which provides free information and legal assistance for residents and prospective residents of retirement village. See [www.caxton.org.au](http://www.caxton.org.au) or phone 07 3214 6333.
  - The Queensland Law Society which can provide a list of lawyers who practice retirement village law. See [www.qls.com.au](http://www.qls.com.au) or phone: 1300 367 757.

### More information

- If you decide to move into a retirement village, the operator will provide you with a Prospective Costs Document for your selected unit, a residence contract and other legal documents.
- By law, you must have a copy of the Village Comparison Document, the Prospective Costs

Document, the village by-laws, your residence contract and all attachments to your residence contract for at least 21 days before you and the operator enter into the residence contract. This is to give you time to read these documents carefully and seek professional advice about your legal and financial interests. You have the right to waive the 21-day period if you get legal advice from a Queensland lawyer about your contract.

**The information in this Village Comparison Document is correct as at 1st July 2022 and applies to prospective residents.**

**Some of the information in this document may not apply to existing residence contracts.**

### Part 1 – Operator and management details

<b>1.1 Retirement village location</b>	Retirement Village Name: <u>Alondra Residences</u> Street Address: <u>25 Union Street</u> Suburb: <u>Nundah</u> State: <u>QLD</u> Post Code: <u>4012</u>
<b>1.2 Owner of the land on which the retirement village scheme is located</b>	Name of land owner: <u>Lutheran Church of Australia Queensland District</u> <u>Australian Registered Body Number (ARBN): 051 602 996</u> Address: <u>Level 1, 24 McDougall Street</u> Suburb: <u>Milton</u> State: <u>QLD</u> Post Code: <u>4064</u>
<b>1.3 Village operator</b>	Name of entity that operates the retirement village (scheme operator): <u>Lutheran Church of Australia Queensland District trading as Lutheran Services ABN 47 291 464 804</u> Australian Registered Body Number (ARBN): <u>051 602 996</u> Address: <u>Level 1, 24 McDougall Street</u> Suburb: <u>Milton</u> State: <u>QLD</u> Post Code: <u>4064</u> Date entity became operator: <u>25th January, 2019</u>
<b>1.4 Village management and onsite availability</b>	Name of village management entity and contact details: <u>Lutheran Church of Australia Queensland District trading as Lutheran Services ABN 47 291 464 804</u> Australian Registered Body Number (ARBN): <u>051 602 996</u> Phone: <u>(07) 3858 3077</u> Email: <u>hello@alondra.com.au</u> An onsite manager (or representative) is available to residents: <input checked="" type="checkbox"/> Part time Onsite availability includes: Weekdays: <u>8:30-4:30pm Monday to Friday</u> Weekends: <u>Nil</u>
<b>1.5 Approved closure plan or transition plan for the retirement village</b>	Is there an approved transition plan for the village? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

	<p>A written transition plan approved by the Department of Housing and Public Works is required when an existing operator is transitioning control of the retirement village scheme's operation to a new operator.</p> <p>Is there an approved closure plan for the village?  <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>A written closure plan approved by the residents of the village (by a special resolution at a residents meeting) or by the Department of Housing and Public Works is required if an operator is closing a retirement village scheme. This includes winding down or stopping to operate the village, even temporarily.</p>
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<p><b>1.6 Statutory Charge over retirement village land.</b></p>	<p>Tenure in a leasehold or freehold scheme is secured by the registration of your interest on the certificate of title for the property. There is no statutory charge registered over leasehold schemes and freehold schemes.</p> <p>In relation to licence schemes, a statutory charge over the land is normally registered on the certificate of title by the chief executive of the department administering the Act. If there is no statutory charge registered on a licence scheme, which may be the case for some religious, charitable or community purpose organisations, you should check if the security of tenure offered meets your requirements.</p> <p>Is a statutory charge registered on the certificate of title for the retirement village land?  <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
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**Part 2 – Age limits**

<p><b>2.1 What age limits apply to residents in this village?</b></p>	<p><u>Applicants must be 65 years of age or over, or in the case of a joint application, at least one applicant must be 65 years of age or over. The operator has the discretion to accept or reject any application for residence in the village and must be satisfied that each applicant is a suitable resident. In exercising that discretion, the operator may accept a person as a resident who does not satisfy the age criteria but who we consider would be a suitable resident for the village.</u></p> <p><u>The operator also reserves the right in future to vary (by increasing or decreasing) the age limit for residents of the village.</u></p>
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**ACCOMMODATION, FACILITIES AND SERVICES**

**Part 3 – Accommodation units: Nature of ownership or tenure**

<p><b>3.1 Resident ownership or tenure of the units in the village is:</b></p>	<p><input type="checkbox"/> Freehold (owner resident)  <input type="checkbox"/> Lease (non-owner resident)  <input checked="" type="checkbox"/> Licence (non-owner resident)  <input type="checkbox"/> Share in company title entity (non-owner resident)  <input type="checkbox"/> Unit in unit trust (non-owner resident)  <input type="checkbox"/> Rental (non-owner resident)  <input type="checkbox"/> Other .....</p>
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**Accommodation types**

<b>3.2 Number of units by accommodation type and tenure</b>	There are <u>52</u> units in the village, comprising <u>0</u> single story units; <u>52</u> units in multi-story building with <u>7</u> levels.			
<b>Accommodation unit</b>	<b>Freehold</b>	<b>Leasehold</b>	<b>Licence</b>	<b>Other</b>
Independent living units				
- Studio				
- One bedroom			9	
- Two bedroom			41	
- Three bedroom			2	
Other				
<b>Total number of units</b>			<b>52</b>	

**Access and design**

<b>3.3 What disability access and design features do the units and the village contain?</b>	<input checked="" type="checkbox"/> Level access from the street into and between all areas of the unit (i.e. no external or internal steps or stairs) in <u>some</u> units <input checked="" type="checkbox"/> Alternatively, a ramp, elevator or lift allows entry into <u>some</u> units <input checked="" type="checkbox"/> Step-free (hobless) shower in <u>all</u> units <input checked="" type="checkbox"/> Width of doorways allow for wheelchair access in <u>all</u> units <input checked="" type="checkbox"/> Toilet is accessible in a wheelchair in <u>all</u> units <input type="checkbox"/> Other key features in the units or village that cater for people with disability or assist residents to age in place: ..... <input type="checkbox"/> None
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**Part 4 – Parking for residents and visitors**

<b>4.1 What car parking in the village is available for residents?</b>	<input type="checkbox"/> <u>0</u> units with own garage or carport attached or adjacent to the unit <input type="checkbox"/> <u>0</u> units with own garage or carport separate from the unit <input type="checkbox"/> <u>0</u> units with own car park space adjacent to the unit <input checked="" type="checkbox"/> <u>All</u> units with own car park space separate from the unit ( <u>basement</u> ) <input type="checkbox"/> General car parking for residents in the village <input type="checkbox"/> Other parking e.g. caravan or boat: ..... <input type="checkbox"/> <u>0</u> units with no car parking for residents <input type="checkbox"/> No car parking for residents in the village Restrictions on resident's car parking include:  <u>N/A</u>
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<p><b>4.2 Is parking in the village available for visitors?</b> If yes, parking restrictions include</p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p><u>15 parking spaces are available for visitors: 4 are located on the ground floor and an additional 11 are located on level 1.</u></p> <p><u>There are also an additional 4 parking spaces available for customers of the café, including 1 space reserved for persons with disability.</u></p> <p><u>The visitor parking spaces are located in unsecured areas –secured parking areas are only accessible by swipe card or intercom from residences.</u></p>
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**Part 5 – Planning and development**

<p><b>5.1 Is construction or development of the village complete?</b></p>	<p>Year village construction started: <u>2018</u></p> <p><input checked="" type="checkbox"/> Fully developed / completed</p> <p><input type="checkbox"/> Partially developed / completed</p> <p><input type="checkbox"/> Construction yet to commence</p>
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<p><b>5.2 Construction, development applications and development approvals</b> Provide details and timeframe of development or proposed development, including the final number and types of units and any new facilities.</p>	<p>Provide detail of any construction, development or redevelopment relating to the retirement village land, including details of any related development approval or development applications in accordance with the <i>Planning Act 2016</i></p> <p><u>Not applicable</u></p>
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<p><b>5.3 Redevelopment plan under the Retirement Villages Act 1999</b></p>	<p>Is there an approved redevelopment plan for the village under the <i>Retirement Villages Act</i>?</p> <p><input type="checkbox"/> Yes   <input checked="" type="checkbox"/> No</p> <p>The Retirement Villages Act may require a written redevelopment plan for certain types of redevelopment of the village and this is different to a development approval. A redevelopment plan must be approved by the residents of the village (by a special resolution at a residents meeting) or by the Department of Housing and Public Works.</p> <p><b>Note:</b> see notice at end of document regarding inspection of the development approval documents.</p>
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**Part 6 – Facilities onsite at the village**

<p><b>6.1 The following facilities are currently available to residents:</b></p>	<p><input type="checkbox"/> Activities or games room</p> <p><input type="checkbox"/> Arts and crafts room</p> <p><input type="checkbox"/> Auditorium</p>	<p><input type="checkbox"/> Medical consultation room</p> <p><input type="checkbox"/> Restaurant</p> <p><input type="checkbox"/> Shop</p>
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	<input checked="" type="checkbox"/> BBQ area outdoors <input type="checkbox"/> Billiards room <input type="checkbox"/> Bowling green [indoor/outdoor] <input type="checkbox"/> Business centre (e.g. computers, printers, internet access) <input type="checkbox"/> Chapel / prayer room <input type="checkbox"/> Communal laundries <input checked="" type="checkbox"/> Community room or centre <input type="checkbox"/> Dining room <input checked="" type="checkbox"/> Gardens <input type="checkbox"/> Gym <input type="checkbox"/> Hairdressing or beauty room <input checked="" type="checkbox"/> Library	<input type="checkbox"/> Swimming pool [indoor / outdoor] [heated / not heated] <input type="checkbox"/> Separate lounge in community centre <input type="checkbox"/> Spa [indoor / outdoor] [heated / not heated] <input type="checkbox"/> Storage area for boats / caravans <input type="checkbox"/> Tennis court [full/half] <input checked="" type="checkbox"/> Village bus or transport <input type="checkbox"/> Workshop - <input checked="" type="checkbox"/> Other <ul style="list-style-type: none"> <li>• <u>Rooftop recreational space</u></li> <li>• <u>Concierge service</u></li> </ul>
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Details about any facility that is not funded from the General Services Charge paid by residents or if there are any restrictions on access or sharing of facilities (e.g. with an aged care facility).

Village bus is shared with the adjoining Zion Residential Aged Care facility.

**6.2 Does the village have an onsite, attached, adjacent or co-located residential aged care facility?**

Yes  No

Name of residential aged care facility and name of the approved provider  
Zion Residential Aged Care operated by Lutheran Church of Australia (Queensland District).

**Note:** Aged care facilities are not covered by the *Retirement Villages Act 1999 (Qld)*. The retirement village operator cannot keep places free or guarantee places in aged care for residents of the retirement village. To enter a residential aged care facility, you must be assessed as eligible by an Aged Care Assessment Team (ACAT) in accordance with the *Aged Care Act 1997 (Cwth)*. Exit fees may apply when you move from your retirement village unit to other accommodation and may involve entering a new contract.

## Part 7 – Services

**7.1 What services are provided to all village residents (funded from the General Services Charge fund paid by residents)?**

- Management and administration;
- Gardening and minor maintenance (excluding gardens and maintenance that is the resident's responsibility under the Residence Contract);
- Recreation or entertainment facilities; and

	<ul style="list-style-type: none"> <li>Other services as detailed each year in the general services budget for the village, which is available upon request.</li> </ul>
<b>7.2 Are optional personal services provided or made available to residents on a user-pays basis?</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <ul style="list-style-type: none"> <li>Help around the home with activities such as cleaning, laundry, gardening and basic maintenance;</li> <li>Assistance with transport, shopping and attending medical appointments or social activities;</li> <li>Personal assistance with activities such as bathing, dressing, mobility, meal preparation and eating; and</li> <li>Nursing, allied health and other therapies.</li> </ul>
<b>7.3 Does the retirement village operator provide government funded home care services under the Aged Care Act 1997 (Cwth)?</b>	<input checked="" type="checkbox"/> Yes, the operator is an Approved Provider of home care under the <i>Aged Care Act 1997</i> (Registered Accredited Care Supplier – RACS ID number 19368) <input type="checkbox"/> Yes, home care is provided in association with an Approved Provider <input type="checkbox"/> No, the operator does not provide home care services, residents can arrange their own home care services

**Note:** Some residents may be eligible to receive a Home Care Package, or a Commonwealth Home Support Program subsidised by the Commonwealth Government if assessed as eligible by an aged care assessment team (ACAT) under the *Aged Care Act 1997 (Cwth)*. These home care services are not covered by the *Retirement Villages Act 1999 (Qld)*. Residents can choose their own approved Home Care Provider and are not obliged to use the retirement village provider, if one is offered.

### Part 8 – Security and emergency systems

<b>8.1 Does the village have a security system?</b> If yes: <ul style="list-style-type: none"> <li>the security system details are:</li> </ul> the security system is monitored between:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  <u>The doors to the village building are secured at all times. All units have access to a video intercom system to allow visitors into the building.</u>
<b>8.2 Does the village have an emergency help system?</b> If yes or optional: <ul style="list-style-type: none"> <li>the emergency help system details are:</li> </ul> the emergency help system is monitored between:	<input checked="" type="checkbox"/> Yes - all residents <input type="checkbox"/> Optional <input type="checkbox"/> No <ul style="list-style-type: none"> <li><u>An emergency call base station and wall button is provided with your unit.</u></li> <li><u>The emergency call button is constantly monitored by a specialist, off-site service provider.</u></li> </ul>
<b>8.3 Does the village have equipment that provides for the safety</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

**or medical emergency of residents?**

If yes, list or provide details e.g. first aid kit, defibrillator

## **COSTS AND FINANCIAL MANAGEMENT**

### **Part 9 – Ingoing contribution - entry costs to live in the village**

*An ingoing contribution is the amount a prospective resident must pay under a residence contract to secure a right to reside in the retirement village. The ingoing contribution is also referred to as the sale price or purchase price. It does not include ongoing charges such as rent or other recurring fees.*

<b>9.1 What is the estimated ingoing contribution (sale price) range for all types of units in the village</b>	<b>Accommodation Unit</b>	<b>Range of ingoing contribution</b>
	Independent living units	
- Studio	N/A	
- One bedroom	<u>\$420,000</u> to <u>\$520,000</u>	
- Two bedrooms	<u>\$550,000</u> to <u>\$720,000</u>	
- Three bedrooms	<u>\$745,000</u> to <u>\$790,000</u>	
Other		
<b>Full range of ingoing contributions for all unit types</b>	<u>\$420,000</u> - <u>\$790,000</u>	

**9.2 Are there different financial options available for paying the ingoing contribution and exit fee or other fees and charges under a residence contract?**

If yes: specify or set out in a table how the contract options work e.g. pay a higher ingoing contribution and less or no exit fee.

Yes  No

Different combinations of ingoing contributions and exit fees can be tailored to suit a resident's specific financial situation. For more information please discuss with your sales consultant.

**9.3 What other entry costs do residents need to pay?**

- Transfer or stamp duty
- Costs related to your residence contract
- Costs related to any other contract
- Advance payment of General Services Charge
  
- Other costs - Nil

### **Part 10 – Ongoing Costs - costs while living in the retirement village**



**General Services Charge:** Residents pay this charge for the general services supplied or made available to residents in the village, which may include management and administration, gardening and general maintenance and other services or facilities for recreation and entertainment described at 7.1.

**Maintenance Reserve Fund contribution:** Residents pay this charge for maintaining and repairing (but not replacing) the village’s capital items e.g. communal facilities, swimming pool. This fund may or may not cover maintaining or repairing items in your unit, depending on the terms of your residence contract.

The budgets for the General Services Charges Fund and the Maintenance Reserve Fund are set each financial year and these amounts can increase each year. The amount to be held in the Maintenance Reserve Fund is determined by the operator using a quantity surveyor’s report.

**Note:** The following ongoing costs are all stated as weekly amounts to help you compare the costs of different villages. However, the billing period for these amounts may not be weekly.

**10.1 Current weekly rates of General Services Charge and Maintenance Reserve Fund contribution**

Type of Unit	General Services Charge (weekly)	Maintenance Reserve Fund contribution (weekly)
All units pay a flat rate	\$139.58	\$32.62

**Last three years of General Services Charge and Maintenance Reserve Fund contribution**

Financial year	General Services Charge (range) (weekly)	Overall % change from previous year	Maintenance Reserve Fund contribution (range) (weekly)	Overall % change from previous year (+ or -)
2020/2021	\$109.27	-19.57	\$29.12	+4.5%
2021/2022	\$131.95	+20.13%	\$30.59	+5.4%
2022/2023	\$139.58	+5.7%	\$32.62	+6.6%

<p><b>10.2 What costs relating to the units are not covered by the General Services Charge? (residents will need to pay these costs separately)</b></p>	<input checked="" type="checkbox"/> Contents insurance <input type="checkbox"/> Home insurance (freehold units only) <input checked="" type="checkbox"/> Electricity <input checked="" type="checkbox"/> Gas	<input type="checkbox"/> Water <input checked="" type="checkbox"/> Telephone <input checked="" type="checkbox"/> Internet <input checked="" type="checkbox"/> Pay TV <input type="checkbox"/> Other
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<p><b>10.3 What other ongoing or occasional costs for repair, maintenance and replacement of items in, on or attached to the units are residents responsible for and pay for while residing in the unit?</b></p>	<input type="checkbox"/> Unit fixtures <input type="checkbox"/> Unit fittings <input type="checkbox"/> Unit appliances <input checked="" type="checkbox"/> None  Additional information All fixtures, fittings and appliances that are provided when moving in are maintained under the General Services Charge and Maintenance Reserve Fund. This includes the dishwasher, microwave, refrigerator, air conditioner, washing machine and dryer. The cost of replacing these items is covered by the Capital Replacement Fund. The resident is responsible for the costs for repair, maintenance and replacement of any items not supplied by the operator upon entry.
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<p><b>10.4 Does the operator offer a maintenance service or help residents arrange repairs and maintenance for their unit?</b> If yes: provide details, including any charges for this service.</p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p>Any repairs not covered under the Maintenance Reserve Fund can be organised through the concierge and paid for by the resident.</p> <p>Any repairs for items covered by the Maintenance Reserve Fund can be organised by the concierge and paid for the Maintenance Reserve Fund.</p>
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**Part 11 – Exit fees – when you leave the village**

*A resident may have to pay an exit fee to the operator when they leave their unit or when the right to reside in their unit is sold. This is also referred to as a ‘deferred management fee’ (DMF).*

<p><b>11.1 Do residents pay an exit fee when they permanently leave their unit?</b> If yes: list all exit fee options that may apply to new contracts</p>	<p><input type="checkbox"/> Yes – all residents pay an exit fee calculated using the same formula</p> <p><input checked="" type="checkbox"/> Yes – all new residents pay an exit fee but the way this is worked out may vary depending on each resident’s residence contract.</p> <p><input type="checkbox"/> No exit fee</p> <p><input type="checkbox"/> Other:</p>
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Time period from date of occupation of unit to the date the resident ceases to reside in the unit	Exit fee calculation based on
1 year	5% of your ingoing contribution
2 years	10% of your ingoing contribution
3 years	15% of your ingoing contribution
4 years	20% of your ingoing contribution
5 years or more	25% of your ingoing contribution
<p><b>Note:</b> if the period of occupation is not a whole number of years, the exit fee is worked out on a daily basis. The maximum (or capped) exit fee is 25% of the ingoing contribution after 5 years of residence. The minimum exit fee is <u>5% of the Ingoing Contribution divided by 365 (daily rate)</u>.</p>	

<p><b>11.2 What other exit costs do residents need to pay or contribute to?</b></p>	<p>Nil</p>
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**Part 12 – Reinstatement and renovation of the unit**

<p><b>12.1 Is the resident responsible for reinstatement of the</b></p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p>
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<p><b>unit when they leave the unit?</b></p>	<p>Reinstatement work means replacements or repairs that are reasonably necessary to return the unit to the same condition it was in when the resident started occupation, apart from:</p> <ul style="list-style-type: none"> <li>• fair wear and tear; and</li> <li>• renovations and other changes to the condition of the unit carried out with agreement of the resident and operator.</li> </ul> <p>Fair wear and tear includes a reasonable amount of wear and tear associated with the use of items commonly used in a retirement village. However, a resident is responsible for the cost of replacing a capital item of the retirement village if the resident deliberately damages the item or causes accelerated wear.</p> <p>Entry and exit inspections and reports are undertaken by the operator and resident to assess the condition of the unit.</p>
<p><b>12.2 Is the resident responsible for renovation of the unit when they leave the unit?</b></p>	<p><input checked="" type="checkbox"/> No</p> <p>Renovation means replacements or repairs other than reinstatement work. By law, the operator is responsible for the cost of any renovation work on a former resident's unit, unless the residence contract provides for the resident to share in the capital gain on the sale of the resident's interest in the unit. Renovation costs are shared between the former resident and operator in the same proportion as any capital gain is to be shared under the residence contract.</p>
<p><b>Part 13– Capital gain or losses</b></p>	
<p><b>13.1 When the resident's interest or right to reside in the unit is sold, does the resident share in the capital <i>gain</i> or capital <i>loss</i> on the resale of their unit?</b></p>	<p><input checked="" type="checkbox"/> No</p>
<p><b>Part 14 – Exit entitlement or buyback of freehold units</b></p>	
<p><i>An exit entitlement is the amount the operator may be required to pay the former resident under a residence contract after the right to reside is terminated and the former resident has left the unit.</i></p>	
<p><b>14.1 How is the exit entitlement which the operator will pay the resident worked out?</b></p>	<p>The exit entitlement is your Ingoing Contribution LESS:</p> <ul style="list-style-type: none"> <li>○ the exit fee (refer item 11.1);</li> <li>○ any outstanding personal or general services;</li> <li>○ any outstanding maintenance reserve fund contributions;</li> <li>○ 100% of the cost of any reinstatement work; and</li> <li>○ any other monies payable by the resident under the Residence Contract or the <i>Retirement Villages Act 1999 (Qld)</i> (if any).</li> </ul>

<p><b>14.2 When is the exit entitlement payable?</b></p>	<p>By law, the operator must pay the exit entitlement to a former resident on or before the <b>earliest</b> of the following days:</p> <ul style="list-style-type: none"> <li>• the day stated in the residence contract <ul style="list-style-type: none"> <li>➤ no date is stated in the residence contract</li> </ul> </li> <li>• 14 days after the settlement of the sale of the right to reside in the unit to the next resident or the operator</li> <li>• 18 months after the termination date of the resident’s right to reside under the residence contract, even if the unit has not been resold, unless the operator has been granted an extension for payment by the Queensland Civil and Administrative Tribunal (QCAT).</li> </ul> <p>In addition, an operator is entitled to see probate or letters of administration before paying the exit entitlement of a former resident who has died.</p>
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<p><b>14.3 What is the turnover of units for sale in the village?</b></p>	<p>7 accommodation units were vacant as at the end of the last financial year</p> <p>23 accommodation units were resold during the last financial year</p> <p>Approx. 9 months was the average length of time to sell a unit over the last financial year (where retirement village has been registered for at least 1, but less than 3 years).</p>
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**Part 15 – Financial management of the village**

<p><b>15.1 What is the financial status for the funds that the operator is required to maintain under the Retirement Villages Act 1999?</b></p>	<p><b>General Services Charges Fund</b> for the last 3 years</p>			
	Financial Year	Deficit/ Surplus	Balance	Change from previous year
	2019-2020	\$0	\$303,922	N/A
	2020-2021	\$45,408	\$296,324	-11.38%
	2021-2022	<u>\$32,503</u>	<u>\$371,349</u>	<u>+25.3%</u>
	Balance of <b>General Services Charges Fund</b> for last financial year <i>OR</i> last quarter if no full financial year available			<u>\$32,503</u>
	Balance of <b>Maintenance Reserve Fund</b> for last financial year <i>OR</i> last quarter if no full financial year available			<u>\$48,542</u>
Balance of <b>Capital Replacement Fund</b> for the last financial year <i>OR</i> last quarter if no full financial year available			<u>\$327,933</u>	

	<p>Percentage of a resident ingoing contribution applied to the Capital Replacement Fund</p> <p>The operator pays a percentage of a resident's ingoing contribution, as determined by a quantity surveyor's report, to the Capital Replacement Fund. This fund is used for replacing the village's capital items.</p>	N/A
<p>OR <input type="checkbox"/> the village is not yet operating.</p>		

**Part 16 – Insurance**

The village operator must take out general insurance, to full replacement value, for the retirement village, including for:

- communal facilities; and
- the accommodation units, other than accommodation units owned by residents.

Residents contribute towards the cost of this insurance as part of the General Services Charge.

<p><b>16.1 Is the resident responsible for arranging any insurance cover?</b> If yes, the resident is responsible for these insurance policies:</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, the resident is responsible for these insurance policies: Residents are responsible for insuring and paying the cost to insure the</p>
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**Part 17 – Living in the village**

***Trial or settling in period in the village***

<p><b>17.1 Does the village offer prospective residents a trial period or a settling in period in the village?</b> If yes: provide details including, length of period, relevant time frames and any costs or conditions</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><u><b>Special Conditions</b></u></p> <p><b>1. Trial Period</b> In these Special Conditions, Trial Period means the period between the Entry Date and the earlier of:</p> <ul style="list-style-type: none"> <li>(a) the date which is four (4) calendar months after the Entry Date,</li> <li>(b) the date of your death; and</li> <li>(c) any other date that we may agree with you in writing.</li> </ul> <p><b>2. Termination during Trial Period</b> You may terminate this agreement at any time during the Trial Period by giving Us not less than fourteen (14) days written notice that you want to terminate this agreement for any reason.</p> <p><b>3. What you must pay</b> If You terminate this agreement during the Trial Period:</p> <ul style="list-style-type: none"> <li>a) We will deduct the following amounts from Your Ingoing Contribution: <ul style="list-style-type: none"> <li>i. Any outstanding personal or General Service charges payable for the Trial Period;</li> <li>ii. Any outstanding Maintenance Reserve Fund contributions payable for the Trial Period;</li> <li>iii. Any costs of Reinstatement Work payable by You;</li> <li>iv. Any interest payable on overdue monies; and</li> <li>v. An administration fee of not more than \$250.</li> </ul> </li> <li>b) We must pay the balance of the Ingoing Contribution after the deduction of the amounts You must pay under Special Condition 3(a) to You no</li> </ul>
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	<p>later than fourteen (14) days after the date on which you vacate the Unit.</p> <p><b>4. Exit Fee</b></p> <p>a) If you terminate this agreement during the Trial Period, the Exit Fee will not be deducted from your Ingoing Contribution.</p> <p>b) If you do not terminate this agreement during the Trial Period, the Exit Fee payable by You is calculated by applying the relevant calculation from the table below. You are not entitled to a share of any capital gain on the resale of the unit and You are not liable for any capital loss on the resale.</p>
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**Pets**

<p><b>17.2 Are residents allowed to keep pets?</b> If yes: specify any restrictions or conditions on pet ownership</p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p><u>Except for assistance animals and fish in a tank, residents may not have pets in the village without the scheme operator's prior written consent. If the scheme operator's consent is given, residents will be required to enter into a separate document with the scheme operator that records additional rights and obligations to allow the pet to resident in the unit with the resident. Please see village management for further details.</u></p>
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**Visitors**

<p><b>17.3 Are there restrictions on visitors staying with residents or visiting?</b> If yes: specify any restrictions or conditions on visitors (e.g. length of stay, arrange with manager)</p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p><u>Visitors:</u></p> <ul style="list-style-type: none"> <li>▪ <u>cannot stay in your unit with you for longer than one month in any 12-month period without our prior written consent;</u></li> <li>▪ <u>cannot stay in your unit if you are not staying there at the same time; and</u></li> <li>▪ <u>must comply with the residence agreement and any by-laws.</u></li> </ul>
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**Village by-laws and village rules**

<p><b>17.4 Does the village have village by-laws?</b></p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p>By law, residents may, by special resolution at a residents meeting and with the agreement of the operator, make, change or revoke by-laws for the village. Note: See notice at end of document regarding inspection of village by-laws</p>
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<p><b>17.5 Does the operator have other rules for the village.</b></p>	<p><input type="checkbox"/> Yes   <input checked="" type="checkbox"/> No</p>
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**Resident input**

<p><b>17.6 Does the village have a residents committee established</b></p>	<p><input type="checkbox"/> Yes   <input checked="" type="checkbox"/> No</p>
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<b>under the <i>Retirement Villages Act 1999</i>?</b>	By law, residents are entitled to elect and form a residents committee to deal with the operator on behalf of residents about the day-to-day running of the village and any complaints or proposals raised by residents. You may like to ask the village manager about an opportunity to talk with members of the resident committee about living in this village.
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**Part 18 – Accreditation**

<b>18.1 Is the village voluntarily accredited through an industry-based accreditation scheme?</b>	<input checked="" type="checkbox"/> No, village is not accredited <input type="checkbox"/> Yes, village is voluntarily accredited through
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**Note:** Retirement village accreditation schemes are industry-based schemes. The *Retirement Villages Act 1999* does not establish an accreditation scheme or standards for retirement villages.

**Part 19 – Waiting list**

<b>19.1 Does the village maintain a waiting list for entry?</b> If yes, • what is the fee to join the waiting list?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  NIL fee
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**Access to documents**

**The following operational documents are held by the retirement village scheme operator and a prospective resident or resident may make a written request to the operator to inspect or take a copy of these documents free of charge. The operator must comply with the request by the date stated by the prospective resident or resident (which must be at least seven days after the request is given).**

- Certificate of registration for the retirement village scheme
- Certificate of title or current title search for the retirement village land
- Village site plan
- Plans showing the location, floor plan or dimensions of accommodation units in the village
- Plans of any units or facilities under construction
- Development or planning approvals for any further development of the village
- An approved redevelopment plan for the village under the *Retirement Villages Act*
- An approved transition plan for the village
- An approved closure plan for the village
- The annual financial statements and report presented to the previous annual meeting of the retirement village
- Statements of the balance of the capital replacement fund, or maintenance reserve fund or general services charges fund (or income and expenditure for general services) at the end of the previous three financial years of the retirement village
- Statements of the balance of any Body Corporate administrative fund or sinking fund at the end of the previous three years of the retirement village
- Examples of contracts that residents may have to enter into
- Village dispute resolution process

- Village by-laws
- Village insurance policies and certificates of currency
- A current public information document (PID) continued in effect under section 237I of the Act (this applies to existing residence contracts)

*An example request form containing all the necessary information you must include in your request is available on the Department of Housing and Public Works website.*

## Further Information

If you would like more information, contact the Department of Housing and Public Works on 13 QGOV (13 74 68) or visit our website at [www.hpw.qld.gov.au](http://www.hpw.qld.gov.au)

### General Information

General information and fact sheets on retirement villages: [www.qld.gov.au/retirementvillages](http://www.qld.gov.au/retirementvillages)

For more information on retirement villages and other seniors living options:

[www.qld.gov.au/seniorsliving](http://www.qld.gov.au/seniorsliving)

### Regulatory Services, Department of Housing and Public Works

Regulatory Services administers the *Retirement Villages Act 1999*. This includes investigating complaints and alleged breaches of the Act.

Department of Housing and Public Works

GPO Box 690, Brisbane, QLD 4001

Phone: 07 3008 3450

Email: [regulatoryservices@hpw.qld.gov.au](mailto:regulatoryservices@hpw.qld.gov.au)

Website: [www.hpw.qld.gov.au/housing](http://www.hpw.qld.gov.au/housing)

### Queensland Retirement Village and Park Advice Service (QRVPAS)

Specialist service providing free information and legal assistance for residents and prospective residents of retirement villages and manufactured home parks in Queensland.

Caxton Legal Centre Inc.

1 Manning Street, South Brisbane, QLD 4101

Phone: 07 3214 6333

Email: [caxton@caxton.org.au](mailto:caxton@caxton.org.au)

Website: [www.caxton.org.au](http://www.caxton.org.au)

### Department of Human Services (Australian Government)

Information on planning for retirement and how moving into a retirement village can affect your pension

Phone: 132 300

Website: [www.humanservices.gov.au/individuals/subjects/age-pension-and-planning-your-retirement](http://www.humanservices.gov.au/individuals/subjects/age-pension-and-planning-your-retirement)

### Seniors Legal and Support Service

These centres provide free legal and support services for seniors concerned about elder abuse, mistreatment or financial exploitation.

Caxton Legal Centre Inc.

1 Manning Street, South Brisbane, QLD 4101

Phone: 07 3214 6333

Email: [caxton@caxton.org.au](mailto:caxton@caxton.org.au)

Website: <https://caxton.org.au>

### Queensland Law Society

Find a solicitor



Law Society House  
179 Ann Street, Brisbane, QLD 4000  
Phone: 1300 367 757  
Email: [info@qls.com.au](mailto:info@qls.com.au)  
Website: [www.qls.com.au](http://www.qls.com.au)

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**Queensland Civil and Administrative Tribunal (QCAT)**

This independent decision-making body helps resolve disputes and reviews administrative decisions.

GPO Box 1639, Brisbane, QLD 4001  
Phone: 1300 753 228  
Email: [enquiries@qcat.qld.gov.au](mailto:enquiries@qcat.qld.gov.au)  
Website: [www.qcat.qld.gov.au](http://www.qcat.qld.gov.au)

**Department of Justice and Attorney-General**

Dispute Resolution Centres provide a free, confidential and impartial mediation service to the community.

Phone: 07 3006 2518  
Toll free: 1800 017 288  
Website: [www.justice.qld.gov.au](http://www.justice.qld.gov.au)

**Livable Housing Australia (LHA)**

The Livable Housing Guidelines and standards have been developed by industry and the community to provide assurance that a home is easier to access, navigate and live in, as well as more cost effective to adapt when life's circumstances change.

Website: [www.livablehousingaustralia.org.au/](http://www.livablehousingaustralia.org.au/)