# **Village Comparison Document**

Retirement Villages Act 1999 (Section 74)

# This form is effective from 1 February 2019

Queensland Government

ABN: 86 504 771 740

# Name of village: ST MATTHEWS 'THE GLEBE'

#### 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.

Form 3

- 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 https://anglicaresq.org.au/getting-older/retirement/theglebe
- 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 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 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 14<sup>th</sup> February 2024 and applies to prospective residents.

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

| Part 1 – Operator and m  | anagement details   |
|--|---|
| 1.1 Retirement village<br>location   | Retirement Village Name : ST MATTHEWS THE GLEBE<br>Street Address : Beatrice Street<br>Suburb : DRAYTON State : QLD Post Code : 4350  |
| 1.2 Owner of the land<br>on which the<br>retirement village<br>scheme is located | Name of land owner : The Corporation of the Synod of the Diocese of<br>Brisbane<br>Australian Business Number (ABN) : 39 906 010 979<br>Address : 373 Ann Street<br>Suburb : BRISBANE State : QLD Post Code : 4000  |
| 1.3 Village operator   | Name of entity that operates the retirement village (scheme operator)<br>The Corporation of the Synod of the Diocese of Brisbane<br>Australian Business Number (ABN) : 39 906 010 979<br>Address : 373 Ann Street<br>Suburb : BRISBANE State : QLD Post Code : 4000<br>Date entity became operator : 7 October 2002 |
| 1.4 Village<br>management and<br>onsite availability                             | Name of village management entity and contact details<br>Chief Operating Officer Aged & Community, Anglicare Southern Qld<br>Australian Business Number (ABN) : 39 906 010 979<br>Phone (07) 4687 7300 Email : <u>symesthorpe@andlicaresq.org.au</u>  |

|  | The village manager is based nearby at the Anglicare Southern Qld<br>Symes Thorpe Home, The Range, TOOWOOMBA<br>Availability includes:<br>Weekdays: 9:00am – 4:30pm<br>Weekends: Not available   |
|--|--|
| 1.5 Approved closure<br>plan or transition plan<br>for the retirement<br>village     | <ul> <li>Is there an approved transition plan for the village?</li> <li>Yes ⊠ No</li> <li>A written transition plan approved by the Department of Communities,<br/>Housing and Digital Economy is required when an existing operator is<br/>transitioning control of the retirement village scheme's operation to a<br/>new operator.</li> <li>Is there an approved closure plan for the village?</li> <li>Yes ⊠ No</li> <li>A written closure plan approved by the residents of the village (by a<br/>special resolution at a residents meeting) or by the Department of<br/>Communities, Housing and Digital Economy is required if an operator<br/>is closing a retirement village scheme. This includes winding down or<br/>stopping to operate the village, even temporarily.</li> </ul>            |
| Part 2 – Age limits<br>2.1 What age limits<br>apply to residents in<br>this village? | Applicants for residence in the Village must be 70 years or over. In the case<br>of joint applicants, one of them at least must be seventy years of age. The<br>Scheme Operator has the discretion to accept or refuse any application for<br>residence in the Village and must be satisfied that each applicant is a suitable<br>resident. In exercising its discretion, Scheme Operator may accept a person<br>as a resident who does not satisfy the age criteria but who the Scheme<br>Operator considers would be a suitable resident for the Village.<br>The Scheme Operator reserves the right in the future to vary (by increasing or<br>decreasing) the age limit for residents in the Village.<br>As well as meeting the age limit criteria, applicants must be able to live<br>independently. |
|  | CILITIES AND SERVICES n units: Nature of ownership or tenure Freehold (owner resident) Lease (non-owner resident) Kicence (non-owner resident) Share in company title entity (non-owner resident)  |

|  | 🗌 Unit in unit tru   | Unit in unit trust (non-owner resident) |                        |              |  |
|--|--|---|------------------------|--------------|--|
|  | □ Rental (non-owner resident)  |   |                        |              |  |
|  | □ Other  |   |                        |              |  |
| Accommodation types  |  |   |                        |              |  |
| 3.2 Number of units by accommodation type and tenure   | There are 18 unit  | s in the village,                       | , comprising 18 single | story units. |  |
| Accommodation<br>unit  | Freehold   | Leasehold                               | Licence                | Other [name] |  |
| Independent living<br>units  |  |   |                        |              |  |
| - Studio   |  |   |                        |              |  |
| - One bedroom  |  |   |                        |              |  |
| - Two bedroom  |  |   | 18                     |              |  |
| - Three bedroom  |  |   |                        |              |  |
| Serviced units   |  |   |                        |              |  |
| - Studio   |  |   |                        |              |  |
| - One bedroom  |  |   |                        |              |  |
| - Two bedroom  |  |   |                        |              |  |
| - Three bedroom  |  |   |                        |              |  |
| Other  |  |   |                        |              |  |
| Total number of units  | 0  | 0                                       | 18                     | 0            |  |
| Access and design  |  |   |                        |              |  |
| 3.3 What disability<br>access and design<br>features do the units<br>and the village<br>contain? | <ul> <li>☑ Level access from the street into and between all areas of the unit (i.e. no external or internal steps or stairs) in ☑ all □ some units</li> <li>☑ Step-free (hobless) shower in ☑ all □ some units</li> </ul> |   |                        |              |  |
| Part 4 – Parking for resi  | dents and visitors   | S                                       |                        |              |  |
| 4.1 What car parking<br>in the village is<br>available for<br>residents?                         | ⊠ All units with own garage or carport attached or adjacent to the unit  |   |                        |              |  |
| 4.2 Is parking in the village available for visitors?  | ⊠ Yes □ No   |   |                        |              |  |
| If yes, parking restrictions   | Limited visitor pa   | rking available                         | in signed areas.       |              |  |

| Part 5 – Planning and de   | evelopment  |   |  |  |
|--|---|---|--|--|
| 5.1 Is construction or   | Year village construction started 1996  |   |  |  |
| development of the village complete?   | ⊠ Fully developed / completed   |   |  |  |
|  | Partially developed / completed   |   |  |  |
|  | Construction yet to commend   | be and the second se |  |  |
| 5.2 Construction,<br>development<br>applications and<br>development<br>approvals<br>Provide details and<br>timeframe of<br>development or<br>proposed development,<br>including the final<br>number and types of<br>units and any new<br>facilities. | Provide detail of any construction, development or redevelopment<br>relating to the retirement village land, including details of any related<br>development approval or development applications in accordance with<br>the <i>Planning Act 2016</i>  |   |  |  |
| 5.3 Redevelopment<br>plan under the<br><i>Retirement Villages</i><br><i>Act 1999</i>   | Is there an approved redevelopment plan for the village under the <i>Retirement Villages Act</i> ?  |   |  |  |
|  | The Retirement Villages Act may require a written redevelopment plan<br>for certain types of redevelopment of the village and this is different to<br>a development approval. A redevelopment plan must be approved by<br>the residents of the village (by a special resolution at a residents<br>meeting) or by the Department of Communities, Housing and Digital<br>Economy. |   |  |  |
|  | <b>Note:</b> see notice at end of document regarding inspection of the development approval documents.  |   |  |  |
| Part 6 – Facilities onsite   | at the village  |   |  |  |
| 6.1 The following  | ☐ Activities or games room  | Medical consultation room   |  |  |
| facilities are currently available to residents:   | ☐ Arts and crafts room  | □ Restaurant  |  |  |
|  |   | □ Shop  |  |  |
|  |   |   |  |  |
|  | BBQ area outdoors   | Swimming pool [indoor / outdoor]<br>[heated / not heated]   |  |  |
|  | ☐ Billiards room  |   |  |  |
|  | Bowling green<br>[indoor/outdoor]   | └── Separate lounge in community<br>centre<br>──  |  |  |
|  |   | ☐ Spa [indoor / outdoor]  |  |  |
|  |   | [heated / not heated  |  |  |

|   | <ul> <li>Business centre (e.g. computers, printers, internet access)</li> <li>Chapel / prayer room</li> <li>Communal laundries</li> <li>Community room or centre</li> <li>Dining room</li> <li>Gardens</li> <li>Gym</li> <li>Hairdressing or beauty room</li> </ul> | <ul> <li>Storage area for boats / caravans</li> <li>Tennis court [full/half]</li> <li>Village bus or transport</li> <li>Workshop</li> <li>Other</li> </ul>  |  |
|---|---|---|--|
| Library         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).         Community room is the Drayton Parish hall and shared with the local parish,   |   |   |  |
| 6.2 Does the village<br>have an onsite,<br>attached, adjacent or<br>co-located residential<br>aged care facility?   | ☐ Yes ⊠ No  |   |  |
| <b>Note:</b> Aged care facilities are not covered by the <i>Retirement Villages Act 1999 (Qld)</i> . 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 <i>Aged Care Act 1997 (Cwth)</i> . 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<br>provided to all village<br>residents (funded from<br>the General Services<br>Charge fund paid by<br>residents)?  | <ul> <li>disposal and other services<br/>maintenance and repair of a<br/>and other installations locate</li> <li>all insurance premiums paya</li> <li>the costs of minor repairs ar</li> </ul>  | city (common areas), sewerage, waste<br>supplied to the Village and for the<br>Il electrical, plumbing, filtration, sewerage<br>ed in the village;<br>able by the scheme operator;<br>nd day to day maintenance (including<br>necessary to keep the Village in good |  |

|  | <ul> <li>all costs of the day-to-day maintenance of the exterior of all accommodation units in the Village and the interior and exterior of all buildings (except where this is the responsibility of the resident) and other improvements in common use by residents of the Village;</li> <li>all costs of the day-to-day maintenance and caretaking of the gardens, landscaped areas, lawns, pathways, roads and other parts of the</li> </ul> |
|--|--|
|  | common areas of the Village;   |
|  | <ul> <li>all costs of the control and eradication of pests in the common areas<br/>of the Village;</li> </ul>  |
|  | <ul> <li>the costs of management, secretarial, legal audit, bookkeeping;</li> </ul>  |
|  | <ul> <li>accounting and banking services provided in connection with the<br/>Village;</li> </ul>   |
|  | <ul> <li>any costs associated with refuse collection and disposal, including<br/>refuse collection from Village bin enclosures and disposal off site;</li> </ul>   |
|  | <ul> <li>any other expenditure properly incurred in respect of the operation,<br/>management or administration of the Village;</li> </ul>  |
|  | <ul> <li>any costs of maintenance of cables and conduits for Village telephone<br/>and communication systems;</li> </ul>   |
|  | <ul> <li>any other general service funded via a general services charges<br/>budget; and</li> </ul>  |
|  | <ul> <li>any other costs permitted or required by legislation and included in<br/>schedule item 8 of the resident agreement.</li> </ul>  |
| 7.2 Are optional<br>personal services<br>provided or made<br>available to residents<br>on a user-pays basis? | □ Yes ⊠ No   |
| 7.3 Does the<br>retirement village<br>operator provide<br>government funded<br>home care services            | 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 17985)  |
| under the Aged Care<br>Act 1997 (Cwth)?  | ☐ Yes, home care is provided in association with an Approved Provider  |
|  | ☐ No, the operator does not provide home care services, residents can arrange their own home care services   |
|  | ay be eligible to receive a Home Care Package, or a Commonwealth<br>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 en   | nergency systems   |  |  |  |
|--|--|--|--|--|
| 8.1 Does the village<br>have a security<br>system?   | 🗆 Yes 🖾 No   |  |  |  |
| 8.2 Does the village<br>have an emergency<br>help system?  | ⊠ Yes - all residents  | □ Optional □ No  |  |  |
| <ul><li>If yes or optional:</li><li>the emergency help<br/>system details are:</li></ul>   | to be triggered by residents<br>emergency call system is o<br>provide who will call an amb | bendant and a call point are installed in units<br>in the event of an emergency. The<br>perated and administered by an external<br>pulance for the resident, if required. The<br>ed in the general service charge. |  |  |
| the emergency help<br>system is monitored<br>between:  | 24 hours per day, seven days   | per week   |  |  |
| 8.3 Does the village<br>have equipment that<br>provides for the safety<br>or medical emergency<br>of residents?  | 🗌 Yes 🖾 No   |  |  |  |
| COSTS AND FINANCIAL MANAGEMENT   |  |  |  |  |
| Part 9 – Ingoing contrib   | ution - entry costs to live ir   | the village  |  |  |
| An ingoing contribution is the amount a prospective resident must pay under a residence contract<br>to secure a right to reside in the retirement village. The ingoing contribution is also referred to as<br>the sale price or purchase price. It does not include ongoing charges such as rent or other<br>recurring fees. |  |  |  |  |
| 9.1 What is the  | Accommodation Unit   | Range of ingoing contribution  |  |  |
| estimated ingoing<br>contribution (sale<br>price) range for all  | Independent living units   |  |  |  |
|  | - Studio   | \$ to \$   |  |  |
| types of units in the  | - One bedroom  | \$ to \$   |  |  |
| village  | - Two bedrooms   | \$ 230,000   |  |  |
|  | - Three bedrooms   | \$ to \$   |  |  |
|  | Serviced units   |  |  |  |
|  | - Studio   | \$ to \$   |  |  |

|   | <ul> <li>One bedroom</li> <li>Two bedrooms</li> <li>Three bedrooms</li> <li>Other</li> <li>Full range of ingoing contributions for all unit types</li> </ul> | \$ to \$<br>\$ to \$<br>\$ to \$<br>\$ to \$<br>\$ to \$<br>\$ to \$ |
|---|--|--|
| 9.2 Are there different<br>financial options<br>available for paying<br>the ingoing<br>contribution and exit<br>fee or other fees and<br>charges under a<br>residence contract? | □ Yes ⊠ No   |  |
| 9.3 What other entry<br>costs do residents<br>need to pay?  | □ Advance payment of Ger   | er contract e.g  |

# 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<br>contribution<br>(weekly) |
|--------------------------|----------------------------------|--|
| Independent Living Units |                                  |  |
| - Two bedrooms           | \$ 95.42 (+14%)                  | \$ 23.43 (+0.0%)                                     |

| Last three years of General Services Charge and Maintenance Reserve Fund contribution  |  |  |  |   |  |  |
|--|--|--|--|---|--|--|
| Financial<br>year  |  | General Services<br>Charge (range)<br>(weekly) |  | Maintenance<br>Reserve Fund<br>contribution (range)<br>(weekly) |  | Overall %<br>change from<br>previous year<br>(+ or -)        |
| 2022-23  | \$ 83  | .70  | +3.5%  |   | \$23.43  | +2.7%  |
| 2021-22  | \$80   | .87  | +0%  |   | \$22.82  | +2.3%  |
| 2020-21  | \$80   | .87  | +15.5%   |   | \$22.30  | +9.9%  |
|  |  |  |  |   |  |  |
| 10.2 What or the tended of tende |  | Conten   | ts insurance   |   | ☐ Water  |  |
| General Se   |  | Home ir only)                                  | nsurance (freeholo   | d units   | ⊠ Telephone  |  |
| Charge? (re<br>will need to  | pay these  | ⊠ Electric                                     | ity  |   | ⊠ memer  |  |
| costs sepai  | costs separately)  |  | ⊠ Gas  |   | <ul> <li>Pay TV</li> <li>Other : Maintenance of fixtures<br/>installed by resident ( with scheme<br/>operator approval)</li> </ul> |  |
| ongoing or   | 10.3 What other<br>ongoing or occasional<br>costs for repair,  |  | <ul> <li>☑ Unit fixtures</li> <li>☑ Unit fittings</li> </ul> |   |  |  |
| maintenanc   |  | 🖾 Unit appliances                              |  |   |  |  |
| replacement of items<br>in, on or attached to  |  |  |  |   |  |  |
| the units are residents<br>responsible for and<br>pay for while residing<br>in the unit?   | Additional information:<br>You must regularly maintain and repair and replace any alterations or<br>additions and the cost of all such repairs, maintenance or replacement must<br>be paid for by you. |  |  |   |  |  |
|  |  | writing with                                   |  | g at our  | sole discretion, rei   | se approved by us in<br>move all alterations<br>al condition |
| offer a main<br>service or h<br>residents a<br>repairs and<br>maintenand<br>unit?<br>If yes: provi<br>including an   | nelp<br>rrange<br>ce for their<br>ide details,<br>y charges  |  | □ No<br>ntenance officer                                     |   |  |  |
| for this servi   |  |  |  |   |  |  |

# 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). ☑ Yes – all residents pay an exit fee calculated using the same 11.1 Do residents pay formula an exit fee when they □ Yes – all new residents pay an exit fee but the way this is worked out permanently leave may vary depending on each resident's residence contract their unit? □ No exit fee □ Other The exit fee calculation that applies to all new resident contracts is set If yes: list all exit fee out below. All exit fee components are calculated on a pro-rata daily options that may apply basis for partial years of residence to new contracts Time period from date of occupation of unit to the Exit fee calculation based on your ingoing contribution. date the resident ceases to reside in the unit 1 year 7% of your ingoing contribution 2 years 13% of your ingoing contribution 3 years 18% of your ingoing contribution 4 years 22% of your ingoing contribution 5 years 25 % of your ingoing contribution 6 years 27% of your ingoing contribution 7 years 29% of your ingoing contribution 8 years 31% of your ingoing contribution 9 years 33% of your ingoing contribution 10 years 34% of your ingoing contribution Note: if the period of occupation is not a whole number of years, the exit fee will be worked out on a daily basis. The maximum (or capped) exit fee is 34% of the ingoing contribution after 10 years of residence.

The minimum exit fee is 7% of your ingoing contribution x 1/365 (the minimum fee is for 1 day of residence).

| 11.2 What other exit costs do residents  | Sale costs for the unit  |  |  |
|--|--|--|--|
| need to pay or contribute to?  | ⊠ Legal costs  |  |  |
|  | <ul> <li>Other costs: Outstanding personal services or general services charges:</li> <li>outstanding maintenance reserve fund contributions;</li> <li>costs associated with the removal and storage of your contents;</li> </ul>  |  |  |
|  | <ul> <li>interest on overdue monies;</li> <li>other monies owing by you to us under the Residence Agreement or the Act.</li> </ul>   |  |  |
| Part 12 – Reinstatement  | and renovation of the unit   |  |  |
| 12.1 Is the resident responsible for   | 🛛 Yes 🗆 No   |  |  |
| reinstatement of the<br>unit when they leave<br>the unit?  | <ul> <li>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:</li> <li>fair wear and tear; and</li> <li>renovations and other changes to the condition of the unit carried</li> </ul>   |  |  |
|  | out with agreement of the resident and operator.   |  |  |
|  | Fair wear and tear includes a reasonable amount of wear and tear<br>associated with the use of items commonly used in a retirement village.<br>However, a resident is responsible for the cost of replacing a capital<br>item of the retirement village if the resident deliberately damages the<br>item or causes accelerated wear.   |  |  |
|  | Entry and exit inspections and reports are undertaken by the operator<br>and resident to assess the condition of the unit.   |  |  |
| 12.2 Is the resident   | 🖾 No   |  |  |
| responsible for<br>renovation of the unit<br>when they leave the<br>unit?  | Renovation means replacements or repairs other than reinstatement work.  |  |  |
|  | By law, the operator is responsible for the cost of any renovation work<br>on a former resident's unit, unless the residence contract provides for<br>the resident to share in the capital gain on the sale of the resident's<br>interest in the unit. Renovation costs are shared between the former<br>resident and operator in the same proportion as any capital gain is to<br>be shared under the residence contract. |  |  |
| Part 13– Capital gain or   | losses   |  |  |
| 13.1 When the<br>resident's interest or<br>right to reside in the<br>unit is sold, does the<br>resident share in the | 🖾 No   |  |  |

capital *gain* or capital *loss* on the resale of their unit?

# Part 14 – Exit entitlement or buyback of freehold units

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.

| 14.1 How is the exit<br>entitlement which the<br>operator will pay the<br>resident worked out? | <ul> <li>The ingoing contribution (paid to the scheme operator on entry) is repaid to the resident.</li> <li>When the ingoing contribution is repaid to the resident, the resident must pay: <ul> <li>the exit fee</li> <li>the costs of the reinstatement work (if any)</li> <li>any other costs the resident is liable to pay under the residence contract</li> </ul> </li> </ul>   |
|--|---|
| 14.2 When is the exit<br>entitlement payable?  | <ul> <li>By law, the operator must pay the exit entitlement to a former resident on or before the earliest of the following days:</li> <li>the day stated in the residence contract <ul> <li>which is 3 months after the termination of 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> <li>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.</li> </ul> |
| 14.3 What is the<br>turnover of units for<br>sale in the village?                              | NIL accommodation units were vacant as at the end of the last financial<br>year<br>NIL accommodation units were resold during the last financial year<br>Ten months was the average length of time to sell a unit over the last 3<br>financial years  |

# Part 15 – Financial management of the village

| financial status for the<br>funds that the<br>operator is required to<br>maintain under the<br><i>Retirement Villages</i><br><i>Act 1999?</i> | Financial   | Deficit/                         | Balance  | Change from   |
|---|---|----------------------------------|--|---------------|
|   | Year  | Surplus                          |  | previous year |
|   | 2022-23   | (\$394)<br>deficit               | (\$1,781)<br>deficit   | 28%           |
|   | 2021-22   | (\$246)<br>deficit               | (\$1,387)<br>deficit   | 21%           |
|   | 2020-21   | \$2,705<br>surplus               | (\$1,141)<br>deficit   | 70%           |
|   |   |                                  | <b>ces Charges Fund</b> for last<br>rter if no full financial year | (\$1,781)     |
|   | Balance of <b>Maintenance Reserve Fund</b> for last financial year <i>OR</i> last quarter if no full financial year available     |                                  |  | \$174,069     |
|   | Balance of <b>Capital Replacement Fund</b> for the last financial year <i>OR</i> last quarter if no full financial year available |                                  |  | \$262,510     |
|   |   | of a resident i<br>Replacement l | ngoing contribution applied <sup>-</sup><br>Fund                   | to<br>N/A     |
|   | The operato<br>contribution,<br>report, to the<br>used for rep  | g                                |  |               |
|   | OR  the village is not yet operating.   |                                  |  |               |
| [Note: Delete if a Body Co<br>Part 16 – Insurance   | rporate does i  | not apply]                       |  |               |

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.

| <b>16.1 Is the resident</b><br><b>responsible for</b><br><b>arranging any</b><br><b>insurance cover?</b><br>If yes, the resident is<br>responsible for these<br>insurance policies: | $\boxtimes$ Yes $\Box$ No<br>If yes, the resident is responsible for these insurance policies:   |  |  |
|---|--|--|--|
|   | <ul> <li>Contents insurance (for the resident's property in the unit)</li> <li>Worker's compensation insurance (for the resident's employees or contractors)</li> <li>Third-party insurance (for the resident's motor vehicles or mobility devices)</li> </ul> |  |  |

| Part 17 – Living in the village   |   |  |  |  |
|---|---|--|--|--|
| Trial or settling in period in the village  |   |  |  |  |
| 17.1 Does the village<br>offer prospective<br>residents a trial period<br>or a settling in period<br>in the village?            | □ Yes ⊠ No  |  |  |  |
| Pets  |   |  |  |  |
| 17.2 Are residents allowed to keep pets?  | 🛛 Yes 🗌 No  |  |  |  |
| If yes: specify any restrictions or conditions on pet ownership   | Pets are welcome, subject to conditions and scheme operator consent   |  |  |  |
| Visitors  |   |  |  |  |
| 17.3 Are there<br>restrictions on visitors<br>staying with residents<br>or visiting?  | ⊠ Yes □ No  |  |  |  |
| If yes: specify any<br>restrictions or conditions<br>on visitors (e.g. length of<br>stay, arrange with<br>manager)              | You may not allow any other person to Occupy the Unit without our prior<br>written permission, which may be given on such terms as we think fit and<br>withdrawn at any time  |  |  |  |
| Village by-laws and village rules   |   |  |  |  |
| 17.4 Does the village<br>have village by-laws?  | Yes No<br>By law, residents may, by special resolution at a residents meeting and<br>with the agreement of the operator, make, change or revoke by-laws<br>for the village.<br>Note: See notice at end of document regarding inspection of village<br>by-laws |  |  |  |
| 17.5 Does the operator<br>have other rules for<br>the village.  | ☐ Yes ⊠ No<br>If yes: Rules may be made available on request  |  |  |  |
| Resident input  |   |  |  |  |
| 17.6 Does the village<br>have a residents<br>committee established<br>under the <i>Retirement</i><br><i>Villages Act 1999</i> ? | ☐ Yes ⊠ No<br>By law, residents are entitled to elect and form a residents committee<br>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<br>residents.<br>You may like to ask the village manager about an opportunity to talk<br>with members of the resident committee about living in this village. |  |  |  |
|--|--|--|--|--|
| Part 18 – Accreditation  |  |  |  |  |
| 18.1 Is the village<br>voluntarily accredited<br>through an industry-<br>based accreditation<br>scheme?  | <ul> <li>☑ No, village is not accredited</li> <li>□ Yes, village is voluntarily accredited through:</li> </ul>   |  |  |  |
| <b>Note:</b> Retirement village accreditation schemes are industry-based schemes. The <i>Retirement Villages Act 1999</i> does not establish an accreditation scheme or standards for retirement villages.   |  |  |  |  |
| Part 19 – Waiting list   |  |  |  |  |
| 19.1 Does the village<br>maintain a waiting list<br>for entry?   | □ Yes ⊠ No   |  |  |  |
| Access to documents  |  |  |  |  |
| <ul> <li>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).</li> <li>☑ Certificate of registration for the retirement village scheme</li> <li>☑ Certificate of title or current title search for the retirement village land</li> <li>☑ Village site plan</li> </ul>   |  |  |  |  |
| $\boxtimes$ Plans showing the  | location, floor plan or dimensions of accommodation units in the village   |  |  |  |
| <ul> <li>Plans of any units or facilities under construction</li> <li>Development or planning approvals for any further development of the village</li> <li>An approved redevelopment plan for the village under the <i>Retirement Villages Act</i></li> <li>An approved transition plan for the village</li> <li>An approved closure plan for the village</li> </ul>  |  |  |  |  |
| The annual financial statements and report presented to the previous annual meeting  |  |  |  |  |
| <ul> <li>of the retirement village</li> <li>Statements of the balance of the capital replacement fund, or maintenance reserve fund<br/>or general services charges fund (or income and expenditure for general services) at the<br/>end of the previous three financial years of the retirement village</li> <li>Statements of the balance of any Body Corporate administrative fund or sinking fund at the<br/>end of the previous three years of the retirement village</li> <li>Examples of contracts that residents may have to enter into</li> <li>Village dispute resolution process</li> <li>Village by-laws</li> </ul> |  |  |  |  |
| <ul><li>☑ Village insurance p</li><li>☑ A current public inf</li></ul>   | Village insurance policies and certificates of currency<br>A current public information document (PID) continued in effect under section 237I of the<br>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 Communities, Housing and Digital Economy website.

#### **Further Information**

If you would like more information, contact the Department of Communities, Housing and Digital Economy on 13 QGOV (13 74 68) or visit our website at <u>www.chde.gld.gov.au</u>

#### **General Information**

General information and fact sheets on retirement villages: <u>www.qld.gov.au/retirementvillages</u> For more information on retirement villages and other seniors living options: <u>www.qld.gov.au/seniorsliving</u>

#### Regulatory Services, Department of Communities, Housing and Digital Economy

Regulatory Services administers the *Retirement Villages Act 1999*. This includes investigating complaints and alleged breaches of the Act. Department of Communities, Housing and Digital Economy GPO Box 690, Brisbane, QLD 4001 Phone: 07 3013 2666 Email: <u>regulatoryservices@chde.qld.gov.au</u> Website: <u>www.chde.qld.gov.au/regulatoryservices</u>

#### 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: <u>caxton@caxton.org.au</u> Website: <u>caxton.org.au</u>

# **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: <u>www.humanservices.gov.au/individuals/subjects/age-pension-and-planning-your-retirement</u>

#### 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: <u>caxton@caxton.org.au</u> Website: <u>caxton.org.au</u>

# **Queensland Law Society**

Find a solicitor Law Society House 179 Ann Street, Brisbane, QLD 4000 Phone: 1300 367 757 Email: <u>info@qls.com.au</u> Website: www.qls.com.au

#### 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 Website: 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

#### 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/