

## Village Comparison Document

*Retirement Villages Act 1999 (Section 74)*

ABN: 86 504 771 740

This form is effective from 1 February 2019



Name of village: Azure Blue Lifestyle Communities Redcliffe

### 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.azureblueredcliffe.com.au](http://www.azureblueredcliffe.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 25 February 2020 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: Azure Blue Lifestyle Communities Redcliffe Street Address: 85-91 Anzac Avenue Suburb: Redcliffe State: Queensland Post Code: 4020
<b>1.2 Owner of the land on which the retirement village scheme is located</b>	Name of land owner: The Uniting Church in Australia Property Trust (Q) Australian Company Number (ACN): N/A Address: c/- Blue Care, Level 5, 192 Ann Street Suburb: Brisbane State: Queensland Post Code: 4000
<b>1.3 Village operator</b>	Name of entity that operates the retirement village (scheme operator): The Uniting Church in Australia Property Trust (Q) represented by Blue Care ABN 96 010 643 909 Australian Company Number (ACN): N/A Address: C/- Blue Care, Level 5, 192 Ann Street Suburb: Brisbane State: Queensland Post Code: 4000

	<p>Date entity became operator: 2012</p> <p>Is there an approved transition plan for the village?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>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.</i></p> <p>Is there an approved closure plan for the village?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>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.</i></p>
<p><b>1.4 Village management and onsite availability</b></p>	<p>Name of village management entity and contact details: The Uniting Church in Australia Property Trust (Q) represented by Blue Care ABN 96 010 643 909</p> <p>Australian Company Number (ACN): N/A</p> <p>Phone: 1800 990 446</p> <p>Email: rladmin@bluecare.org.au</p> <p>An onsite manager (or representative) is available to residents:</p> <p><input checked="" type="checkbox"/> Full time  <input type="checkbox"/> Part time  <input type="checkbox"/> By appointment only  <input type="checkbox"/> None available  <input type="checkbox"/> Other:</p> <p>Onsite availability includes:</p> <p>Weekdays: 9am to 4pm  Weekends: No availability</p>
<p><b>1.5 Approved closure plans and transition plans for the retirement village</b></p>	<p>Is there an approved transition plan for the village?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>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.</i></p> <p>Is there an approved closure plan for the village?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>

	<p><i>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.</i></p>
<p><b>1.6 Statutory Charge over retirement village land.</b></p>	<p><i>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.</i></p> <p><i>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.</i></p> <p>Is a statutory charge registered on the certificate of title for the retirement village land?</p> <p><input type="checkbox"/> Yes   <input checked="" type="checkbox"/> No</p> <p>If yes, provide details of the registered statutory charge: Not applicable</p>
<p><b>Part 2 – Age limits</b></p>	
<p><b>2.1 What age limits apply to residents in this village?</b></p>	<p>Single occupants must be at least 65. For multiple occupants, one must be at least 65 and the other must be at least 60.</p> <p>The scheme operator must be satisfied that each occupant is able to live independently in the accommodation unit and is a suitable person to live in the village.</p>
<p><b>ACCOMMODATION, FACILITIES AND SERVICES</b></p>	
<p><b>Part 3 – Accommodation units: Nature of ownership or tenure</b></p>	
<p><b>3.1 Resident ownership or tenure of the units in the village is:</b></p>	<p><input type="checkbox"/> Freehold (owner resident)</p> <p><input type="checkbox"/> Lease (non-owner resident)</p> <p><input checked="" type="checkbox"/> Licence (non-owner resident)</p> <p><input type="checkbox"/> Share in company title entity (non-owner resident)</p> <p><input type="checkbox"/> Unit in unit trust (non-owner resident)</p> <p><input type="checkbox"/> Rental (non-owner resident)</p> <p><input type="checkbox"/> Other</p>

Accommodation types				
<b>3.2 Number of units by accommodation type and tenure</b>	There are 122 units in the village, comprising 122 units in multi-storey building/s with 4 levels			
Accommodation Unit	Freehold	Leasehold	Licence	Other
Independent living units				
Studio				
- One bedroom			10	
- Two bedrooms			87	
- Three bedrooms			25	
Serviced units				
- Studio				
- One bedroom				
- Two bedrooms				
- Three bedrooms				
Other				
Total number of units			122	

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 <input type="checkbox"/> all <input checked="" type="checkbox"/> some units <input checked="" type="checkbox"/> Alternatively, a ramp, elevator or lift allows entry into <input type="checkbox"/> all <input checked="" type="checkbox"/> some units <input checked="" type="checkbox"/> Step-free (hobless) shower in <input checked="" type="checkbox"/> all <input type="checkbox"/> some units <input checked="" type="checkbox"/> Width of doorways allow for wheelchair access in <input type="checkbox"/> all <input checked="" type="checkbox"/> some units <input checked="" type="checkbox"/> Toilet is accessible in a wheelchair in <input checked="" type="checkbox"/> all <input type="checkbox"/> some 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

Part 4 – Parking for residents and visitors	
<b>4.1 What car parking in the village is available for residents?</b>	<input type="checkbox"/> All / Some [unit type] units with own garage or carport attached or adjacent to the unit <input type="checkbox"/> All / Some [unit type] units with own garage or carport separate from the unit <input type="checkbox"/> All / Some [unit type] units with own car park space adjacent to the unit <input checked="" type="checkbox"/> All / Some [unit type] units with own car park space separate from the unit <input type="checkbox"/> General car parking for residents in the village <input type="checkbox"/> Other parking e.g. caravan or boat:

	<input type="checkbox"/> ..... 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:
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<b>4.2 Is parking in the village available for visitors?</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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**Part 5 – Planning and development**

<b>5.1 Is construction or development of the village complete?</b>	Year village construction started: 2012 <input checked="" type="checkbox"/> Fully developed / completed <input type="checkbox"/> Partially developed / completed <input type="checkbox"/> Construction yet to commence
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<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.	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> : Not applicable.
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<b>5.3 Redevelopment plan under the Retirement Villages Act 1999</b>	Is there an approved redevelopment plan for the village under the <i>Retirement Villages Act</i> ? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No  <i>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.</i>  Note: see notice at end of document regarding inspection of the development approval documents.
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**Part 6 – Facilities onsite at the village**

<b>6.1 The following facilities are currently available to residents:</b>	<input checked="" type="checkbox"/> Activities or games room <input checked="" type="checkbox"/> Arts and crafts room <input type="checkbox"/> Auditorium <input checked="" type="checkbox"/> BBQ area outdoors <input type="checkbox"/> Billiards room	<input checked="" type="checkbox"/> Medical consultation room <input checked="" type="checkbox"/> Restaurant <input type="checkbox"/> Shop <input checked="" type="checkbox"/> Swimming pool [outdoor, heated] <input type="checkbox"/> Separate lounge in community
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	<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 type="checkbox"/> Gardens <input checked="" type="checkbox"/> Gym <input checked="" type="checkbox"/> Hairdressing or beauty room <input checked="" type="checkbox"/> Library	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: Media room
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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).  
Not applicable.

**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: Blue Care Redcliffe Aged Care Facility; Blue Care

**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)?**

'General Services' provided to all residents are:

- Operating the retirement village for the benefit and enjoyment of residents.
- Managing the community facilities.
- Managing security at the retirement village.
- Maintaining the security system, emergency help system and/or safety equipment (if any).
- Maintaining fire-fighting and protection equipment.
- Maintaining and updating safety and emergency procedures for the retirement village.
- Cleaning, maintaining and repairing the community facilities.

	<ul style="list-style-type: none"> <li>• Maintaining, repairing and replacing units and items in, on or attached to the units (except where this is a resident's responsibility).</li> <li>• Monitoring and eradicating pests.</li> <li>• Engaging staff and contractors necessary for the operation of the retirement village, which may include a village manager, cleaning and maintenance personnel, security personnel, personal care and nursing personnel and/or relief personnel.</li> <li>• Arranging for administrative, secretarial, book-keeping, accounting and legal services necessary for the operation of the retirement village.</li> <li>• Maintaining any licences required in relation to the retirement village.</li> <li>• Paying operating costs in connection with the ownership and operation of the retirement village.</li> <li>• Maintaining insurances relating to the retirement village that are required by the <i>Retirement Villages Act 1999</i> or contemplated by a residence contract or that the scheme operator otherwise deems appropriate.</li> <li>• Complying with the <i>Retirement Villages Act 1999</i>.</li> <li>• Any other general service funded via a general services charges budget for a financial year.</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
<b>7.3 Does the retirement village operator provide government funded home care services under the <i>Aged Care Act 1997 (Cwth)</i>?</b>	<input checked="" type="checkbox"/> Yes, the operator is an Approved Provider of home care under the <i>Aged Care Act 1997</i> (National Approved Provider System – NAPS ID number 18092, 18093. Blue Care Home Care services available to residents.  <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
<p><b>Note:</b> 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 <i>Aged Care Act 1997 (Cwth)</i>. These home care services are not covered by the <i>Retirement Villages Act 1999 (Qld)</i>.  <b>Residents can choose their own approved Home Care Provider and are not obliged to use the retirement village provider, if one is offered.</b></p>	



## Part 8 – Security and emergency systems

<b>8.1 Does the village have a security system?</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<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> <li>the emergency help system is monitored between:</li> </ul>	<input checked="" type="checkbox"/> Yes - all residents <input type="checkbox"/> Optional <input type="checkbox"/> No  The emergency system is monitored off-site. The cost of this service is included in the general services charge.  24 hours, 7 days per week.
<b>8.3 Does the village have equipment that provides for the safety or medical emergency of residents?</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 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		
	- One bedroom		\$ 273,000 to \$ 293,000
	- Two bedrooms		\$ 288,000 to \$ 445,000
	- Three bedrooms		\$ 425,000 to \$ 551,000
	Serviced units		
	- Studio		
	- One bedroom		
	- Two bedrooms		
	- Three bedrooms		
	Other		
	<b>Full range of ingoing contributions for all unit types</b>		\$ 273,00 to \$ 551,000
	<b>9.2 Are there different financial options available for paying the ingoing contribution and exit fee or other fees and</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  The standard licence contract type is available to <u>all residents</u> .  There are two alternative contract types which may be available on application to the scheme operator:	

<p><b>charges under a residence contract?</b> 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.</p>	<ul style="list-style-type: none"> <li>• Limited licence; and</li> <li>• Concessional licence.</li> </ul> <p><b>Note from the scheme operator:</b> <i>The scheme operator may at its complete discretion offer a limited licence contract or a concessional licence contract to a resident on application to the scheme operator.</i></p> <p>The key differences between the 3 contract options are:</p> <table border="1" data-bbox="470 369 1503 1769"> <thead> <tr> <th data-bbox="470 369 758 515">Contract option</th> <th data-bbox="758 369 1177 515">Payments on exit</th> <th data-bbox="1177 369 1503 515">Exit entitlement payment date after vacating the village (refer 14.2)</th> </tr> </thead> <tbody> <tr> <td data-bbox="470 515 758 996">Standard Licence</td> <td data-bbox="758 515 1177 996">Residents receive a refund of their ingoing contribution. At the time the ingoing contribution is refunded, residents receive 50% of any capital gain and must pay 50% of any capital loss. Various amounts are also set off the ingoing contribution, including the exit fee (see section 11.1 for more details).</td> <td data-bbox="1177 515 1503 996">18 months</td> </tr> <tr> <td data-bbox="470 996 758 1332">Limited Licence</td> <td data-bbox="758 996 1177 1332">Residents do not receive a refund of their ingoing contribution. Residents receive an Exit Payment (if any), the amount of which is calculated in accordance with the residence contract.</td> <td data-bbox="1177 996 1503 1332">90 days</td> </tr> <tr> <td data-bbox="470 1332 758 1769">Concessional Licence</td> <td data-bbox="758 1332 1177 1769">Residents do not receive any payments on exit. Residents pay a weekly Accommodation Fee for the term of the residence contract, instead of an ingoing contribution on entry. See item 9.3 and item 11.1 for other fees that a resident must pay on entry to and exit from the village.</td> <td data-bbox="1177 1332 1503 1769">N/A</td> </tr> </tbody> </table>	Contract option	Payments on exit	Exit entitlement payment date after vacating the village (refer 14.2)	Standard Licence	Residents receive a refund of their ingoing contribution. At the time the ingoing contribution is refunded, residents receive 50% of any capital gain and must pay 50% of any capital loss. Various amounts are also set off the ingoing contribution, including the exit fee (see section 11.1 for more details).	18 months	Limited Licence	Residents do not receive a refund of their ingoing contribution. Residents receive an Exit Payment (if any), the amount of which is calculated in accordance with the residence contract.	90 days	Concessional Licence	Residents do not receive any payments on exit. Residents pay a weekly Accommodation Fee for the term of the residence contract, instead of an ingoing contribution on entry. See item 9.3 and item 11.1 for other fees that a resident must pay on entry to and exit from the village.	N/A
Contract option	Payments on exit	Exit entitlement payment date after vacating the village (refer 14.2)											
Standard Licence	Residents receive a refund of their ingoing contribution. At the time the ingoing contribution is refunded, residents receive 50% of any capital gain and must pay 50% of any capital loss. Various amounts are also set off the ingoing contribution, including the exit fee (see section 11.1 for more details).	18 months											
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Concessional Licence	Residents do not receive any payments on exit. Residents pay a weekly Accommodation Fee for the term of the residence contract, instead of an ingoing contribution on entry. See item 9.3 and item 11.1 for other fees that a resident must pay on entry to and exit from the village.	N/A											
<p><b>9.3 What other entry costs do residents need to pay?</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Transfer or stamp duty</li> <li><input checked="" type="checkbox"/> Costs related to your residence contract</li> <li><input type="checkbox"/> Costs related to any other contract e.g. ....</li> <li><input type="checkbox"/> Advance payment of General Services Charge</li> <li><input checked="" type="checkbox"/> Other costs</li> </ul> <p><b>Note from the scheme operator:</b> <i>Residents who apply and are accepted for a concessional licence contract will be required to pay the</i></p>												

*Contract Administration Fee and Administration Fee (which is equivalent to 4 x the weekly Accommodation Fee). Details about these amounts are available from the scheme operator on request.*

## **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**

<b>Type of Unit</b>	<b>General Services Charge (weekly)</b>	<b>Maintenance Reserve Fund contribution (weekly)</b>
Independent Living Units		
- Studio		
- One bedroom		
- Two bedrooms		
- Three bedrooms		
Serviced Units		
- Studio		
- One bedroom		
- Two bedrooms		
- Three bedrooms		
Other		
All units pay a flat rate	\$ 115.01	\$28.07

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

<b>Financial year</b>	<b>General Services Charge (range) (weekly)</b>	<b>Overall % change from previous year</b>	<b>Maintenance Reserve Fund contribution (range) (weekly)</b>	<b>Overall % change from previous year (+ or -)</b>
2018/19	\$111.07 to \$111.07	19.1%	\$27.66 to \$27.66	6.8%
2017/18	\$93.27 to \$93.27	5.3%	\$25.89 to \$25.89	9.2%
2016/17	\$88.56 to \$88.56	-15.6%	\$23.71 to \$23.71	9.9%

<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>	<p><input checked="" type="checkbox"/> Contents insurance</p> <p><input type="checkbox"/> Home insurance (freehold units only)</p> <p><input checked="" type="checkbox"/> Electricity</p> <p><input checked="" type="checkbox"/> Gas</p>	<p><input checked="" type="checkbox"/> Water</p> <p><input checked="" type="checkbox"/> Telephone</p> <p><input checked="" type="checkbox"/> Internet</p> <p><input checked="" type="checkbox"/> Pay TV</p> <p><input type="checkbox"/> Other:</p>
<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>	<p><input type="checkbox"/> Unit fixtures</p> <p><input type="checkbox"/> Unit fittings</p> <p><input type="checkbox"/> Unit appliances</p> <p><input checked="" type="checkbox"/> None</p> <p>Additional information: Residents are responsible for the items they own or bring into their units, any alterations they make to their units, and replacing light globes.</p>	
<p><b>10.4 Does the operator offer a maintenance service or help residents arrange repairs and maintenance for their unit?</b></p> <p>If yes: provide details, including any charges for this service.</p>	<p><input checked="" type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p>Unit fixtures and appliances provided by scheme operator are maintained by the scheme operator. This service is included in the general services charge and maintenance reserve fund contribution.</p>	
<p><b>Part 11 – Exit fees - when you leave the village</b></p>		
<p><i>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).</i></p>		
<p><b>11.1 Do residents pay an exit fee when they permanently leave their unit?</b></p> <p>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 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 checked="" type="checkbox"/> Other</p> <p>For a standard licence, the exit fee is 6% of the ingoing contribution for the first year of residence, plus 5% for the second year, plus 4% for each of the third, fourth and fifth years, plus 3% for each of the sixth, seventh and eighth years, up to a maximum of 8 years (32%)</p> <p>The exit fee is calculated on a pro-rata daily basis for partial years of residence.</p> <p><b>Note from the scheme operator:</b> <i>If a resident applies for and is accepted for a limited licence contract or a concessional licence contract, the resident will not be required to pay an exit fee.</i></p> <p><i>Under a concessional licence contract, an End of Licence Fee is</i></p>	

	<i>payable the amount of which is available from the scheme operator on request.</i>	
Time period from date of occupation of unit to the date the resident ceases to reside in the unit	Exit fee calculation based on: your ingoing contribution	
1 year	6% of your ingoing contribution	
2 years	11% of your ingoing contribution	
3 years	15% of your ingoing contribution	
4 years	19% of your ingoing contribution	
5 years	23% of your ingoing contribution	
6 years	26% of your ingoing contribution	
7 years	29% of your ingoing contribution	
8 years	32% of your ingoing contribution	
9 years	32% of your ingoing contribution	
10 years	32% of your ingoing contribution	
<p><b>Note:</b> if the period of occupation is not a whole number of years, the exit fee will be worked out on a daily basis.</p> <p>The maximum (or capped) exit fee is 32% of the ingoing contribution after 8 years of residence.</p> <p>The minimum exit fee is: 6% of your ingoing contribution x 1/365.</p> <p><b>Note from the scheme operator:</b> <i>The minimum exit fee is for 1 day of residence.</i></p>		
<b>11.2 What other exit costs do residents need to pay or contribute to?</b>	<input checked="" type="checkbox"/> Sale costs for the unit <input checked="" type="checkbox"/> Legal costs <input type="checkbox"/> Other costs:	
<p><b>Note from scheme operator:</b> <i>If a resident applies for and is accepted for a limited licence contract or a concessional licence contract, the resident is not required to contribute to the sale costs for the unit or legal costs.</i></p>		

## Part 12 – Reinstatement and renovation of the unit

**12.1 Is the resident responsible for reinstatement of the unit when they leave the unit?**

Yes  No

**Note from operator:** *If a resident applies for and is accepted for a limited licence contract or a concessional licence contract, the resident is only responsible for damage they cause to the accommodation unit. The scheme operator will pay all other costs associated with reinstatement work.*

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:

- fair wear and tear; and
- renovations and other changes to the condition of the unit carried out with agreement of the resident and operator.

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.

Entry and exit inspections and reports are undertaken by the operator and resident to assess the condition of the unit.

**12.2 Is the resident responsible for renovation of the unit when they leave the unit?**

Yes, all residents pay .....% of any renovation costs (in same proportion as the share of the capital gain on the sale of their unit)

Optional, residents on a standard licence must pay 50% of any renovation costs (in same proportion as the share of the capital gain on the sale of their unit)

No

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.

**Note from scheme operator:** *If a resident applies for and is accepted for a limited licence contract or a concessional licence contract, the resident is not responsible for any renovation costs.*

## Part 13 – Capital gain or losses

**13.1 When the resident's interest or right to reside in the unit is sold, does the resident share in the capital gain or capital loss on the resale of their unit?**

- Yes, the resident's share of the capital gain is .....%  
the resident's share of the capital loss is .....%
- Optional - residents on a standard licence share in a capital gain or loss  
the resident's share of the capital gain is 50 %  
the resident's share of the capital loss is 50 %  
OR is based on a formula .....
- No

**Note from scheme operator:** *If a resident applies for and is accepted for a limited licence contract or a concessional licence contract, the resident does not share in capital gain or loss.*

## 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 entitlement which the operator will pay the resident worked out?**

### Standard Licence

The ingoing contribution (paid to the scheme operator on entry) is repaid to the resident plus the resident's share of capital gain (see item 13.1).

When the scheme operator makes this payment, the resident must pay to the scheme operator the following amounts:

- the exit fee (see item 11.1);
- the sales costs and legal costs (see item 11.2);
- the costs of reinstatement work (see item 12.1);
- the resident's share of the costs of renovation work (see item 12.2);
- the resident's share of any capital loss (see item 13.1); and
- any other outstanding amounts payable by the resident under the residence contract.

**Note from the scheme operator:** *If a resident applies for and is accepted for a limited licence contract, the resident receives an Exit Payment (if any) the amount of which is calculated in accordance with the residence contract.*

*If a resident applies for and is accepted for a concessional licence contract, the resident must pay the End of Licence Fee in accordance with the residence contract.*

**14.2 When is the exit entitlement payable?**

By law, the operator must pay the exit entitlement to a former resident on or before the **earliest** of the following days:

- the day stated in the residence contract
  - no date is stated in the residence contract
- 14 days after the settlement of the sale of the right to reside in the unit to the next resident or the operator

- 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).

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.

**Note from scheme operator:** *If a resident applies for and is accepted for a limited licence contract, the resident receives their Exit Payment within 90 days of the termination of the residence contract.*

**14.3 What is the turnover of units for sale in the village?**

29 accommodation units were vacant as at the end of the last financial year

14 accommodation units were resold during the last financial year

6 - 9 months was the average length of time to sell a unit over the last three financial years

**Part 15 – Financial management of the village**

**15.1 What is the financial status for the funds that the operator is required to maintain under the Retirement Villages Act 1999?**

<b>General Services Charges Fund</b> for the last 3 years			
Financial Year	Deficit/Surplus	Total general service charges collected for the financial year	Change from previous year
2018/2019	0	\$704,616	-99,935%
2017/18	-\$99,935	\$591,677	75.2%
2016/17	-\$57,050	\$561,795	-151.0%
Balance of <b>General Services Charges Fund</b> for last financial year OR last quarter if no full financial year available			-\$37,611
Balance of <b>Maintenance Reserve Fund</b> for last financial year OR last quarter if no full financial year available			\$184,591.00
Balance of <b>Capital Replacement Fund</b> for the last financial year OR last quarter if no full financial year available			\$212,583.00
Percentage of a resident ingoing contribution applied to the Capital Replacement Fund			N/A (amounts are paid each year as recommended by the quantity surveyor's report)
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.			

OR

the village is not yet operating.



## 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.

### 16.1 Is the resident responsible for arranging any insurance cover?

If yes, the resident is responsible for these insurance policies:

Yes  No

If yes, the resident is responsible for these insurance policies:

- Contents insurance (for the resident's property in the unit)
- Public liability insurance (for incidents occurring in the resident's unit)
- Workers' compensation insurance (for the resident's employees or contractors)
- Third-party insurance (for the resident's motor vehicles or mobility devices)

## Part 17 – Living in the village

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

#### 17.1 Does the village offer prospective residents a trial period or a settling in period in the village?

Yes  No

### *Pets*

#### 17.2 Are residents allowed to keep pets?

If yes: specify any restrictions or conditions on pet ownership

Yes  No

Pets are welcome, if the scheme operator's prior consent is obtained.

### *Visitors*

#### 17.3 Are there restrictions on visitors staying with residents or visiting?

If yes: specify any restrictions or conditions on visitors (e.g. length of stay, arrange with manager)

Yes  No

Residents must notify Village Management of any visitors who stay overnight, and must stay in the unit at the same time as their visitor. The scheme operator's prior consent is required for any visitor to stay for more than 14 consecutive nights or for more than 60 days (in total) in any 12 month period, or for more than 4 visitors to stay overnight at the same time. All visitors must complete a log book and agree to adhere to the village rules.

### *Village by-laws and village rules*

#### 17.4 Does the village have village by-laws?

Yes  No

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
<b>17.5 Does the operator have other rules for the village.</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes: Rules may be made available on request
<b>Resident input</b>	
<b>17.6 Does the village have a residents committee established under the Retirement Villages Act 1999?</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No 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.
<b>Part 18 – Accreditation</b>	
<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:
<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.	
<b>Part 19 – Waiting list</b>	
<b>19.1 Does the village maintain a waiting list for entry?</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 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, 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)

### **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/)