

Village Comparison Document

Retirement Villages Act 1999 (Section 74)

This form is effective from 1 February 2019

ABN: 86 504 771 740



ST PAUL DE CHARTRES RETIREMENT UNITS

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.spcagedcare.org.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 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 01/01/2023 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

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| 1.1 Retirement village location | Retirement Village Name: St Paul de Chartres Retirement Units Street Address: 12 Fedrick Street Suburb: Boronia Heights State: Qld Post Code: 4124 |
| 1.2 Owner of the land on which the retirement village scheme is located | Name of land owner: The Sisters of St Paul de Chartres Australia ABN 11 653 875 280 Australian Company Number (ACN): N/A Address 28 Fedrick Street Suburb: Boronia Heights State: Qld Post Code: 4124 |
| 1.3 Village operator | Name of entity that operates the retirement village (scheme operator): The Sisters of St Paul de Chartres Australia ABN 11 653 875 280 Australian Company Number (ACN): N/A Address: 28 Fedrick St Suburb: Boronia Heights State: Qld Post Code: 4124 Date entity became operator: 6 September 2001 |
| 1.4 Village management and onsite availability | Name of village management entity and contact details: St Paul de Chartres Residential Aged Care/Retirement Units ABN 11 653 875 280 Australian Company Number (ACN): N/A Phone: (07) 3809-6323 or (07) 3800-7188 Email: admin@spcagedcare.org.au |

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| | <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 Monday to Friday, 8.00am to 4pm</p> <p>Weekends Staff availability for emergencies</p> |
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| <p>1.5 Approved closure plan or transition plan for the retirement village</p> | <p>Is there an approved transition plan for the village? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>A written transition plan approved by the Department of Communities, Housing and Digital Economy 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? <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 Communities, Housing and Digital Economy 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> |
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| <p>1.6 Statutory Charge over retirement village land.</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. It 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>If yes, provide details of the registered statutory charge</p> <p>.....</p> |
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Part 2 – Age limits

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| <p>2.1 What age limits apply to residents in this village?</p> | <p>Applicants for residence at the Village must be 70 (seventy) years of age or over. Where there is more than one applicant, only one</p> |
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person need be 70 (seventy) years or over, and in such cases residents hold joint tenancy. The age limitation may be amended at the discretion of the Sisters of St Paul de Chartres upon Application.

ACCOMMODATION, FACILITIES AND SERVICES

Part 3 – Accommodation units: Nature of ownership or tenure

3.1 Resident ownership or tenure of the units in the village is:

- Freehold (owner resident)
 Lease (non-owner resident)
 Licence (non-owner resident)
 Share in company title entity (non-owner resident)
 Unit in unit trust (non-owner resident)
 Rental (non-owner resident)
 Other *[specify]*

Accommodation types

3.2 Number of units by accommodation type and tenure

There are 82 units in the village, comprising 82 single story units; 0 units in multi-story building with 0 levels

| Accommodation Unit | Freehold | Leasehold | Licence | Other |
|--|----------|-----------|---------|-------|
| Independent living units | | | | |
| Studio | | | | |
| — One bedroom | | | | |
| — Two bedrooms | | | | |
| — Three bedrooms | | | | |
| Serviced units | | | | |
| — Studio | | | | |
| — One bedroom | | | | |
| — Two bedrooms | | | | |
| — Three bedrooms | | | | |
| Other: <i>Independent living units</i> | | | | |
| • One bedroom with carport | | | 6 | |
| • One bedroom with carpark | | | 1 | |
| • Two bedrooms with carport | | | 13 | |
| • Two bedrooms with carport, two toilets | | | 2 | |
| • Two bedrooms with garage | | | 14 | |
| • Two bedroom with garage, two toilets | | | 8 | |
| • Two bedrooms with ensuite | | | 22 | |
| • Three bedrooms with ensuite | | | 16 | |
| Total number of units | | | 82 | |

| Access and design | |
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| 3.3 What disability access and design features do the units and the village contain? | <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 checked="" type="checkbox"/> all <input type="checkbox"/> some units <input type="checkbox"/> Alternatively, a ramp, elevator or lift allows entry into <input type="checkbox"/> all <input 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 checked="" type="checkbox"/> all <input 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 | |
| 4.1 What car parking in the village is available for residents? | <input checked="" type="checkbox"/> All 2 and 3 bedroom 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 checked="" type="checkbox"/> Some 1 bedroom units with own car park space adjacent to the unit <input checked="" type="checkbox"/> 1 only 1 bedroom unit 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 checked="" type="checkbox"/> 0 units with no car parking for residents <input type="checkbox"/> No car parking for residents in the village <p>Restrictions on resident's car parking include: Residents are not permitted to park in non-car park areas.</p> |
| 4.2 Is parking in the village available for visitors? If yes, parking restrictions include | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Visitors must park in designated car parking areas |
| Part 5 – Planning and development | |
| 5.1 Is construction or development of the village complete? | Year village construction started: 1990 <input checked="" type="checkbox"/> Fully developed / completed <input type="checkbox"/> Partially developed / completed <input type="checkbox"/> Construction yet to commence |

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| <p>5.2 Construction, development applications and development approvals 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>Not applicable</p> |
| <p>5.3 Redevelopment plan under the Retirement Villages Act 1999</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><i>The Retirement Villages Act may require a written redevelopment plan for certain types of redevelopments 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 Communities, Housing and Digital Economy.</i></p> <p>Note: see notice at end of document regarding inspection of the development approval documents.</p> |

Part 6 – Facilities onsite at the village

| | | |
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| <p>6.1 The following facilities are currently available to residents:</p> | <p><input checked="" type="checkbox"/> Activities or games room</p> <p><input checked="" type="checkbox"/> Arts and crafts room</p> <p><input type="checkbox"/> Auditorium</p> <p><input checked="" type="checkbox"/> BBQ area outdoors</p> <p><input type="checkbox"/> Billiards room</p> <p><input type="checkbox"/> Bowling green [indoor/outdoor]</p> <p><input type="checkbox"/> Business centre (e.g. computers, printers, internet access)</p> <p><input checked="" type="checkbox"/> Chapel / prayer room</p> <p><input type="checkbox"/> Communal laundries</p> <p><input checked="" type="checkbox"/> Community room or centre</p> <p><input type="checkbox"/> Dining room</p> | <p><input checked="" type="checkbox"/> Medical consultation room</p> <p><input type="checkbox"/> Restaurant</p> <p><input type="checkbox"/> Shop</p> <p><input type="checkbox"/> Swimming pool [indoor / outdoor] [heated / not heated]</p> <p><input type="checkbox"/> Separate lounge in community centre</p> <p><input type="checkbox"/> Spa [indoor / outdoor] [heated / not heated]</p> <p><input type="checkbox"/> Storage area for boats / caravans</p> <p><input type="checkbox"/> Tennis court [full/half]</p> <p><input checked="" type="checkbox"/> Village bus or transport</p> |
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| | <input checked="" type="checkbox"/> Gardens <input checked="" type="checkbox"/> Gym <input checked="" type="checkbox"/> Hairdressing or beauty room <input checked="" type="checkbox"/> Library | <input type="checkbox"/> Workshop <input type="checkbox"/> Other |
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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).

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: St Paul de Chartres Residential Aged 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.
- Providing, operating and managing the community areas and facilities.
- Gardening and landscaping.
- 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 areas and facilities.
- Maintaining, repairing and replacing units and items in, on or attached to the units (except where this is a resident's responsibility).
- Monitoring and eradicating pests.
- 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.

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| | <ul style="list-style-type: none"> • Arranging for administrative, secretarial, book-keeping, accounting and legal services necessary for the operation of the retirement village. • Maintaining any licences required in relation to the retirement village. • Paying operating costs in connection with the ownership and operation of the retirement village. • 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. • Complying with the <i>Retirement Villages Act 1999</i>. • Any other general service funded via a general services charges budget for a financial year. |
| <p>7.2 Are optional personal services provided or made available to residents on a user-pays basis?</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Hairdressing</p> <p>Podiatrist</p> <p>The scheme operator or a third party may provide these services, on a user pays basis, on request. Details about fees can be obtained on request from the scheme operator.</p> |
| <p>7.3 Does the retirement village operator provide government funded home care services under the <i>Aged Care Act 1997 (Cwth)</i>?</p> | <p><input 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)</p> <p><input checked="" type="checkbox"/> Yes, home care is provided in association with an Approved Provider: <i>Wongaburra Home Care</i></p> <p><input type="checkbox"/> No, the operator does not provide home care services, residents can arrange their own home care services</p> |
| <p>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 <i>Aged Care Act 1997 (Cwth)</i>. These home care services are not covered by the <i>Retirement Villages Act 1999</i> (Qld). Residents can choose their own approved Home Care Provider and are not obliged to use the retirement village provider, if one is offered.</p> | |
| <p>Part 8 – Security and emergency systems</p> | |
| <p>8.1 Does the village have a security system? If yes:</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> |

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| <ul style="list-style-type: none"> the security system details are: <p>the security system is monitored between:</p> | <p>The operator has engaged a security firm to provide a security guard on site from 9pm to 5am, 7 days per week.</p> |
| <p>8.2 Does the village have an emergency help system?</p> <p>If yes or optional:</p> <ul style="list-style-type: none"> the emergency help system details are: <p>the emergency help system is monitored between:</p> | <p><input checked="" type="checkbox"/> Yes - all residents <input type="checkbox"/> Optional <input type="checkbox"/> No</p> <p>Emergency call system installed in bathroom, shower, main bedroom and living area and one emergency pendant per unit. When activated in an emergency a notification is sent to the registered nurse in the aged care facility.</p> <p><i>Residents must call 000 for life threatening situations if able to do so.</i></p> <p>12.00am and 12.00pm, 7 days per week.</p> |
| <p>8.3 Does the village have equipment that provides for the safety or medical emergency of residents?</p> <p>details e.g. first aid kit, defibrillator</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>The on-site aged care facility provides for medical emergencies that require first aid.</p> <p>A first aid kit is located in the community centre.</p> |

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.

| | | |
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| <p>9.1 What is the estimated ingoing contribution (sale price) range for all types of units in the village</p> | <p>Accommodation Unit</p> | <p>Range of ingoing contribution</p> |
| | <p>Independent living units</p> | |
| | <p>- Studio</p> | <p>\$ to \$</p> |
| | <p>- One bedroom</p> | <p>\$ 235 000.00 to \$235 000.00</p> |
| | <p>- Two bedrooms</p> | <p>\$ 300 000.00 to \$340 000.00</p> |
| | <p>- Three bedrooms</p> | <p>\$ 385 000.00 to \$385 000.00</p> |
| | <p>Serviced units</p> | |
| | <p>— Studio</p> | <p>\$ to \$</p> |
| | <p>— One bedroom</p> | <p>\$ to \$</p> |
| | <p>— Two bedrooms</p> | <p>\$ to \$</p> |
| | <p>— Three bedrooms</p> | <p>\$ to \$</p> |
| | <p>Other [specify]</p> | <p>\$ to \$</p> |

| | | |
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| | Full range of ingoing contributions for all unit types | \$ 235 000.00 to \$ 385 000.00 |
|--|---|--------------------------------|

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

The operator **may** offer prospective residents other contract options of paying a lower ingoing contribution by a set percentage rate of the original ingoing contribution in return for paying a higher exit fee upon exiting the village. The two contract options offered are referred to as **Contract 1 and Contract 2**

The contract options can be summarised as stated below:

| Contract Options | Percentage of Original Standard Ingoing Contribution | Relevant Exit Fee Table refer to item 11.1 | Maximum Exit Fee Percentage (based on your Original Standard Ingoing Contribution) |
|-------------------------|--|--|--|
| Contract 1 | 100% | Table 1 | 30% |
| Contract 2 | 95% | Table 2 | 33.5% |
| | | | |
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| | | | |

“Original Standard Ingoing Contribution” in this document means the ingoing contribution that would be payable by you if you entered into a “Contract 1” residence contract, at the time you were granted the licence to occupy the unit under your residence contract.

The village operator reserves the right at any time to make amendments to the contract options it offers to residents of the village (including any following resident/s to your unit). Without limitation, the village operator’s right in this regard includes the right:

- a) to introduce or discontinue one or more contract options;
- b) to change the units or number of units in respect of which the village operator offers one or more contact options;
- c) Not to offer one or more contract options in respect of one or more units; or
- d) to vary the details of one or more of the contract options

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 e.g.
- Advance payment of General Services Charge
- Other costs

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) |
|---------------------------|-------------------------------------|---|
| Independent Living Units | As at 01/7/2022 | As at 01/7/2022 |
| - Studio | | |
| - One bedroom | | |
| o 1 resident | \$69.09 | |
| o 2 residents | \$75.74 | |
| - Two bedrooms | | |
| o 1 resident | \$110.04 | |
| o 2 residents | \$116.69 | |
| - Three bedrooms | | |
| o 1 resident | \$121.66 | |
| o 2 residents | \$128.31 | |
| Serviced Units | | |
| — Studio | | |
| — One bedroom | | |
| — Two bedrooms | | |
| — Three bedrooms | | |
| Other: | | |
| All units pay a flat rate | | \$30.73 (inclusive) |

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 -) |
|----------------|---|-------------------------------------|---|---|
| 2022/23 | \$69.09 to \$128.31 | 6.1% | \$30.73 to \$30.73 | 3.3% |

| | | | | |
|---------|---------------------|------|--------------------|-------|
| 2021/22 | \$65.17 to \$121.03 | 5.4% | \$29.75 to \$29.75 | 2.9% |
| 2020/21 | \$29.75 To \$114.80 | 1.8% | \$28.91 to \$28.91 | 3.25% |

| | | |
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| 10.2 What costs relating to the units are not covered by the General Services Charge? (residents will need to pay these costs separately) | <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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| 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? | <input checked="" type="checkbox"/> Unit fixtures <input checked="" type="checkbox"/> Unit fittings <input checked="" type="checkbox"/> Unit appliances <input type="checkbox"/> None Additional information: <ul style="list-style-type: none"> Residents must maintain the Unit and repair, maintain and replace any fixtures, fittings, equipment, appliances, furniture, furnishings and other property belonging to the resident in the Unit. Residents must carry out regular maintenance and repair of equipment, fixtures and fittings provided by the operator in the Unit. Residents must repair or replace specified items that the Operator provides in the Unit (for example, air-conditioning units) | |
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| 10.4 Does the operator offer a maintenance service or help residents arrange repairs and maintenance for their unit? If yes: provide details, including any charges for this service. | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No The scheme operator will offer to obtain quotes (at no cost to resident) from contractors for plumbing and electrical works for approved alterations. Residents are responsible for payment of contractors and for the carrying out of approved alterations. | |
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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).

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| 11.1 Do residents pay an exit fee when they | <input type="checkbox"/> Yes – all residents pay an exit fee calculated using the same formula <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. | |
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| <p>permanently leave their unit?</p> <p>If yes: list all exit fee options that may apply to new contracts</p> | <p><input type="checkbox"/> No exit fee</p> <p><input type="checkbox"/> Other</p> <p>Exit fees are calculated as a percentage (set out in the table below) of your Ingoing Contribution.</p> <p>The exit fee table applicable depends on the contract option selected by you before you enter into your residence contract (see item 9.2).</p> |
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TABLE 1 – CONTRACT 1

| 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 Original Ingoing Contribution, according to the period from (and including) the commencement date of your residence contract to (and including) your Exit Date |
|---|---|
| 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 | 25% of your ingoing contribution |
| 6 years | 30% 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 30% of the ingoing contribution after 6 years of residence.

The minimum exit fee is 5% of your ingoing contribution x 1/365.

Note from the scheme operator: The minimum exit fee is for 1 day of residence.

TABLE 2 – CONTRACT 2

| 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 Original Ingoing Contribution, according to the period from (and including) the commencement date of your residence contract to (and including) your Exit Date |
|---|---|
| 1 year | 8.5% of your ingoing contribution |
| 2 years | 13.5% of your ingoing contribution |

| | |
|---|------------------------------------|
| 3 years | 18.5% of your ingoing contribution |
| 4 years | 23.5% of your ingoing contribution |
| 5 years | 28.5% of your ingoing contribution |
| 6 years | 33.5% of your ingoing contribution |
| <p>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 33.5% of the ingoing contribution after 6 years of residence. The minimum exit fee is 8.5% of your ingoing contribution x 1/365.</p> <p>Note from the scheme operator: The minimum exit fee is for 1 day of residence.</p> | |

11.2 What other exit costs do residents need to pay or contribute to?

- Sale costs for the unit
- Note from the scheme operator:** No marketing or advertising costs are usually incurred, however, the scheme operator reserves the right to incur sale costs and recover the relevant proportion from the resident.*
- Legal costs
- Other costs
- The Termination Administration Costs, being the operator's costs of and incidental to termination of the residence contract, including costs of preparing, execution and stamping any document or a record of death;
 - Any General Services Charge and Maintenance Reserve Fund contributions which are outstanding; and GST, including on the exit fee, if any.

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
- 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

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

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| <p>unit when they leave the unit?</p> | <p><input type="checkbox"/> Optional, only applies to residents who share in the capital gain on the sale of their unit, and the resident pays% of any renovation costs</p> <p><input checked="" type="checkbox"/> No</p> <p><i>Renovation means replacements or repairs other than reinstatement work.</i></p> <p>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> |
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Part 13– Capital gain or losses

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| <p>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?</p> | <p><input type="checkbox"/> Yes, the resident's share of the capital gain is % the resident's share of the capital loss is % OR is based on a formula [specify]</p> <p><input type="checkbox"/> Optional - residents can elect to share in a capital gain or loss option the resident's share of the capital gain is % the resident's share of the capital loss is % OR is based on a formula [specify]</p> <p><input checked="" type="checkbox"/> No</p> |
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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.

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| <p>14.1 How is the exit entitlement which the operator will pay the resident worked out?</p> | <p>The ingoing contribution (paid to the scheme operator on entry) is repaid to the resident less:</p> <ul style="list-style-type: none"> • the exit fee (see section 11.1); • any sales and marketing costs (see section 11.2); • any Termination Administration Costs (see section 11.2); and <p>any outstanding General Services Charges, Maintenance Reserve Fund Contributions or other amounts payable by the resident to the operator under the residence contract.</p> |
| <p>14.2 When is the exit entitlement payable?</p> | <p>By law, the operator must pay the exit entitlement to a former resident on or before the earliest of the following days:</p> <ul style="list-style-type: none"> • the day stated in the residence contract which is 6 months after the termination of 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 |

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| | <ul style="list-style-type: none"> 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). <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> |
| <p>14.3 What is the turnover of units for sale in the village?</p> | <p>1 accommodation units were vacant as at the end of the last financial year.</p> <p>8 accommodation units were resold during the last financial year.</p> <p>6 months was the average length of time to sell a unit over the last three financial years.</p> |

Part 15 – Financial management of the village

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| <p>15.1 What is the financial status for the funds that the operator is required to maintain under the Retirement Villages Act 1999?</p> | <p>General Services Charges Fund for the last 3 years</p> | | | |
| | <p>Financial Year</p> | <p>Deficit/Surplus</p> | <p>Total general service charges collected for the financial year</p> | <p>Change from previous year</p> |
| | | | | |
| | <p>2021/22</p> | <p>28 640</p> | <p>\$481 056</p> | <p>9.5%</p> |
| | <p>2020/21</p> | <p>(20518.00)</p> | <p>\$439 123</p> | <p>1.3%</p> |
| | <p>2019//20</p> | <p>(5184.00)</p> | <p>\$433 466</p> | <p>3.07%</p> |
| | | | | |
| | <p>Balance of General Services Charges Fund for last financial year <i>OR</i> last quarter if no full financial year available</p> | | <p>\$28 640.00</p> | |
| | <p>Balance of Maintenance Reserve Fund for last financial year <i>OR</i> last quarter if no full financial year available</p> | | <p>\$17 462.00</p> | |
| | <p>Balance of Capital Replacement Fund for the last financial year <i>OR</i> last quarter if no full financial year available</p> | | <p>\$11 411.00</p> | |
| <p>Percentage of a resident ingoing contribution applied to the Capital Replacement Fund</p> | | <p><i>N/A (amounts are paid each year as recommended by the quantity surveyor's report)</i></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.</p> | | | | |

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| | This fund is used for replacing the village's capital items. | |
| OR <input type="checkbox"/> 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

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. The resident must comply with all conditions to that consent. A copy of the scheme operator's pet policy is available on request.

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

Visitors may stay with a resident for up to 1 month (in total) in any 12-month period. Longer stays are allowed with the scheme operator's prior consent. The resident must stay in the unit at the same time as their visitor.

Village by-laws and village rules

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

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| <p>17.6 Does the village have a residents committee established under the Retirement Villages Act 1999?</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><i>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.</i></p> <p><i>You may like to ask the village manager about an opportunity to talk with members of the resident committee about living in this village.</i></p> |
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Part 18 – Accreditation

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| <p>18.1 Is the village voluntarily accredited through an industry-based accreditation scheme?</p> | <p><input checked="" type="checkbox"/> No, village is not accredited.</p> <p><input type="checkbox"/> Yes, village is voluntarily accredited through:</p> <p>.....</p> <p>.....</p> |
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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

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| <p>19.1 Does the village maintain a waiting list for entry?</p> <p>If yes,</p> <ul style="list-style-type: none"> what is the fee to join the waiting list? | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input checked="" type="checkbox"/> No fee</p> <p><input type="checkbox"/> Fee of \$..... which is</p> <ul style="list-style-type: none"> <input type="checkbox"/> refundable on entry to the village <input type="checkbox"/> non-refundable |
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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 2371 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 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 www.chde.qld.gov.au

General Information

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

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: regulatoryservices@chde.qld.gov.au

Website: www.chde.qld.gov.au/regulatoryservices

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

Website: 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

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

Website: 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

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/