



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: **BRODRIBB RETIREMENT VILLAGE**

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.brodhome.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 6 July 2021 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

1.1 Retirement village location

Retirement Village Name: Brodribb Retirement Village
Street Address: 8 Brodribb Street
Suburb: Toowoomba City State: Qld Post Code: 4350

1.2 Owner of the land on which the retirement village scheme is located

Name of land owner: Brodribb Home Incorporated
Australian Business Number (ABN): 17976113930
Address: 13 Goggs Street
Suburb: Toowoomba City State: Qld Post Code: 4350

1.3 Village operator

Name of entity that operates the retirement village (scheme operator):
Brodribb Home Incorporated
Australian Business Number (ABN): 17976113930
Address: 13 Goggs Street
Suburb: Toowoomba City State: Qld Post Code: 4350
Date entity became operator: 01/07/2000

Is there an approved transition plan for the village?

Yes No

A written transition plan approved by the Department of Housing and Public Works is required when an existing operator is transitioning control of the retirement village scheme's operation to a new operator.

	<p>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 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>1.4 Village management and onsite availability</p>	<p>Name of village management entity and contact details:</p> <p>Brodrigg Retirement Village</p> <p>Australian Business Number (ABN) : 17976113930</p> <p>Phone (070 4602 0290 Email: homecareadmin@brodhome.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 [specify]</p> <p>Onsite availability includes:</p> <p>Weekdays: 8.30am to 5.00pm Weekends: -----</p>
<p>Part 2 – Age limits</p>	
<p>2.1 What age limits apply to residents in this village?</p>	<p>65 years or older</p>

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 34 units in the village, comprising 22 single story units; 12 units in multi-story building with 3 levels

Accommodation Unit	Freehold	Leasehold	Licence	Other <i>[name]</i>
Independent living units				
Studio				
- One bedroom				
- Two bedrooms			15	
- Three bedrooms			7	
Serviced units				
- Studio				
- One bedroom			12	
- Two bedrooms				
- Three bedrooms				
Other <i>[specify]</i>				
Total number of units			34	

Access and design

3.3 What disability access and design features do the units and the village contain?

[Note: Delete either 'all' or 'some' which ever does not apply]

- Level access from the street into and between all areas of the unit (i.e. no external or internal steps or stairs) in all some units
 Alternatively, a ramp, elevator or lift allows entry into all some units
 Step-free (hobless) shower in all some units
 Width of doorways allow for wheelchair access in all some units
 Toilet is accessible in a wheelchair in all some units
 Other key features in the units or village that cater for people with disability or assist residents to age in place
 24 hour emergency phones
 None

Part 4 – Parking for residents and visitors

4.1 What car parking in the village is available for residents?

- Some units with own garage or carport attached or adjacent to the unit
 All / Some [unit type] units with own garage or carport separate from the unit
 All / Some [unit type] units with own car park space adjacent to the unit
 All / Some [unit type] units with own car park space separate from the unit
 General car parking for residents in the village
 Other parking e.g. caravan or boat

 19 units with no car parking for residents
 No car parking for residents in the village
 Restrictions on resident's car parking include:

4.2 Is parking in the village available for visitors?

[Note: Delete if this does not apply]
 If yes, parking restrictions include e.g. time limit, swipe card/code; *[or are available on request]*

- Yes No
 Parking restrictions include time limits

Part 5 – Planning and development

5.1 Is construction or development of the village complete?

- Year village construction started 1996
 Fully developed / completed
 Partially developed / completed
 Construction yet to commence

5.2 Is there development approval or a development application pending for further development or redevelopment of the village?

[Note: Delete the following if this does not apply]
 If yes to either:

- Development approval granted
 Yes No

- Development application pending
 Yes No

<ul style="list-style-type: none"> • Provide details and timeframe of development or proposed development, including the final number and types of units and any new facilities. 	<p>.....</p> <p>.....</p> <p>Note: see notice at end of document regarding inspection of the development approval documents.</p>
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Part 6 – Facilities onsite at the village

<p>6.1 The following facilities are currently available to residents:</p>	<table border="0"> <tr> <td style="vertical-align: top;"> <input type="checkbox"/> Activities or games room <input type="checkbox"/> Arts and crafts room <input type="checkbox"/> Auditorium <input type="checkbox"/> BBQ area outdoors <input type="checkbox"/> Billiards room <input type="checkbox"/> Bowling green [indoor/outdoor] <input type="checkbox"/> Business centre (e.g. computers, printers, internet access) <input type="checkbox"/> Chapel / prayer room <input type="checkbox"/> Communal laundries <input checked="" type="checkbox"/> Community room or centre <input type="checkbox"/> Dining room <input checked="" type="checkbox"/> Gardens <input type="checkbox"/> Gym <input type="checkbox"/> Hairdressing or beauty room <input checked="" type="checkbox"/> Library </td> <td style="vertical-align: top;"> <input type="checkbox"/> Medical consultation room <input type="checkbox"/> Restaurant <input type="checkbox"/> Shop <input type="checkbox"/> Swimming pool [indoor / outdoor] [heated / not heated] <input checked="" type="checkbox"/> Separate lounge in community centre <input type="checkbox"/> Spa [indoor / outdoor] [heated / not heated] <input type="checkbox"/> Storage area for boats / caravans <input type="checkbox"/> Tennis court [full/half] <input type="checkbox"/> Village bus or transport <input type="checkbox"/> Workshop <input type="checkbox"/> Other [specify] <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> </td> </tr> </table>	<input type="checkbox"/> Activities or games room <input type="checkbox"/> Arts and crafts room <input type="checkbox"/> Auditorium <input type="checkbox"/> BBQ area outdoors <input type="checkbox"/> Billiards room <input type="checkbox"/> Bowling green [indoor/outdoor] <input type="checkbox"/> Business centre (e.g. computers, printers, internet access) <input type="checkbox"/> Chapel / prayer room <input type="checkbox"/> Communal laundries <input checked="" type="checkbox"/> Community room or centre <input type="checkbox"/> Dining room <input checked="" type="checkbox"/> Gardens <input type="checkbox"/> Gym <input type="checkbox"/> Hairdressing or beauty room <input checked="" type="checkbox"/> Library	<input type="checkbox"/> Medical consultation room <input type="checkbox"/> Restaurant <input type="checkbox"/> Shop <input type="checkbox"/> Swimming pool [indoor / outdoor] [heated / not heated] <input checked="" type="checkbox"/> Separate lounge in community centre <input type="checkbox"/> Spa [indoor / outdoor] [heated / not heated] <input type="checkbox"/> Storage area for boats / caravans <input type="checkbox"/> Tennis court [full/half] <input type="checkbox"/> Village bus or transport <input type="checkbox"/> Workshop <input type="checkbox"/> Other [specify] <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
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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).

Coffee shop, hairdresser & beautician may be accessible in co-located Residential Aged Care Facility. However such accessibility may be limited at the facilities' discretion, for example during a pandemic.

<p>6.2 Does the village have an onsite, attached, adjacent or co-located residential aged care facility?</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Name of residential aged care facility and name of the approved provider</p> <p>The Brodribb Home, Brodribb Home Incorporated</p>
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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

<p>7.1 What services are provided to all village residents (funded from the General Services Charge paid by residents)?</p>	<p>Management and administration</p> <p>Regular activities in Community Centre (may be limited at certain times at Management’s discretion – for example during a pandemic).</p> <p>Care coordinator</p> <p>24 hour emergency phone</p> <p>Maintenance & upkeep of all common areas</p>
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<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> <ul style="list-style-type: none"> • Domestic, personal care and nursing services • Costs will depend on the nature and frequency of services provided. A separate agreement will be entered into for personal services.
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<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 checked="" type="checkbox"/> Yes, the operator is an Approved Provider of home care under the <i>Aged Care Act 1997</i> (Registered Accredited Care Supplier – RACS ID number 153)</p> <p><input type="checkbox"/> Yes, home care is provided in association with an Approved Provider</p> <p>.....</p> <p><input type="checkbox"/> No, the operator does not provide home care services, residents can arrange their own home care services</p>
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Note: Some residents may be eligible to receive a Home Care Package, or a Commonwealth Home Support Program subsidised by the Commonwealth Government if assessed as eligible by an aged care assessment team (ACAT) under the *Aged Care Act 1997 (Cwth)*. These home care services are not covered by the *Retirement Villages Act 1999 (Qld)*.
Residents can choose their own approved Home Care Provider and are not obliged to use the retirement village provider, if one is offered.

Part 8 – Security and emergency systems

<p>8.1 Does the village have a security system? <i>[Note: Delete the following if this does not apply]</i> If yes:</p> <ul style="list-style-type: none"> the security system details are: the security system is monitored between: 	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Gates to Village are locked at night Night patrols by security company</p> <p>.....am andpmdays per week.</p>
<p>8.2 Does the village have an emergency help system? <i>[Note: Delete the following if this does not apply]</i> If yes or optional:</p> <ul style="list-style-type: none"> the emergency help system details are: the emergency help system is monitored between: 	<p><input checked="" type="checkbox"/> Yes - all residents <input type="checkbox"/> Optional <input type="checkbox"/> No</p> <p>24 hour Emergency Phone (uses mobile sim card) monitored by Tunstall are provided in all units.</p> <p>24 hours per day 7 days per week.</p>
<p>8.3 Does the village have equipment that provides for the safety or medical emergency of residents? <i>[Note: Delete the following if this does not apply]</i> If yes, list or provide details e.g. first aid kit, defibrillator</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>First Aid Kit in Community Centre Grab rails & height adjustable shower roses in showers Emergency Phone System</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.

9.1 What is the estimated ingoing contribution (sale price) range for all types of units in the village	Accommodation Unit	Range of ingoing contribution
	Independent living units	
	- Studio	\$ to \$.....
	- One bedroom	\$ to \$.....
	- Two bedrooms	\$ 280,000 to \$315,000
	- Three bedrooms	\$ 320,000 to \$340,000.....
	Serviced units	
	- Studio	\$ to \$.....
	- One bedroom	\$ 235,000 to \$ 235,000
	- Two bedrooms	\$ to \$.....
	- Three bedrooms	\$ to \$.....
	Other <i>[specify]</i>	\$ to \$.....
	Full range of ingoing contributions for all unit types	\$ 235,000 to \$ 340, 000

<p>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? <i>[Note: Delete the following if this does not apply]</i> 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>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Brodribb Retirement Village offers the following contract options:</p> <p>Option 1 – Standard Option</p> <p>The resident pays an ingoing contribution based on the Standard Ingoing Contribution by the commencement date of the residence contract and defers the Standard Exit Fee until the resident leaves the village. When the resident leaves the village, the exit fee is deducted from the refund of the ingoing contribution. See Part 11 for details of the Exit Fee.</p> <p>Option 2 – Customised Option</p> <p>This option enables you and Brodribb Retirement Village to enter into a Residence Contract with terms that are similar to the Standard Option but which may be customised to suit your particular circumstances. Terms which we may consider varying include the Ingoing Contribution Amount, the manner in which the Ingoing Contribution is paid and the Exit Fee amount.</p> <p>.....</p> <p>.....</p> <p>.....</p>
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9.3 What other entry costs do residents need to pay?	<input type="checkbox"/> Transfer or stamp duty <input checked="" type="checkbox"/> Costs related to your residence contract \$100 <input type="checkbox"/> Costs related to any other contract e.g. [specify] <input type="checkbox"/> Advance payment of General Services Charge <input checked="" type="checkbox"/> Other costs [specify] Your own legal costs if you choose to incur any
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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 Charge 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 <i>[Note: Delete all types of units or items that do not apply]</i>	General Services Charge <i>Excluding Maintenance Reserve Fund Contribution (weekly)</i>	Maintenance Reserve Fund contribution <i>(weekly)</i>
Independent Living Units		
- Studio	\$	\$
- One bedroom	\$	\$
- Two bedrooms	\$	\$
- Three bedrooms	\$	\$
Serviced Units		
- Studio	\$	\$
- One bedroom	\$	\$
- Two bedrooms	\$	\$
- Three bedrooms	\$	\$
Other <i>[specify e.g. based on number of occupants or unit size. Add rows if required]</i>	\$	\$
All units pay a flat rate	\$ 80.64	\$ 19.67

<p>10.2 What costs relating to the units are not covered by the General Services Charge? (residents will need to pay these costs separately)</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 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[specify]</p>
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<p>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?</p>	<p><input checked="" type="checkbox"/> Unit fixtures</p> <p><input checked="" type="checkbox"/> Unit fittings</p> <p><input checked="" type="checkbox"/> Unit appliances</p> <p><input type="checkbox"/> None</p> <p>Additional information Note: The resident is not responsible for the maintenance or replacement of hot water systems.</p>
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<p>10.4 Does the operator offer a maintenance service or help residents arrange repairs and maintenance for their unit? <i>[Note: Delete the following if this does not apply]</i> If yes: provide details, including any charges for this service.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Village Maintenance staff are able to do minor maintenance and will arrange for tradesmen to do other maintenance as required. Costs will depend on service provided.</p> <p>.....</p> <p>.....</p>
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Part 11– Exit fees - when you leave the village

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

<p>11.1 Do residents pay an exit fee when they permanently leave their unit?</p> <p><i>[Note: Delete the following if does not apply]</i> If yes: list all exit fee options that may apply to new contracts</p> <p><i>[If multiple options apply, exit fee table should be repeated for each option]</i></p>	<p><input type="checkbox"/> Yes – all residents pay an exit fee calculated using the same formula</p> <p><input checked="" type="checkbox"/> Yes – all new residents pay an exit fee but the way this is worked out may vary depending on each resident’s residence contract</p> <p><input type="checkbox"/> No exit fee</p> <p><input type="checkbox"/> Other [specify]</p> <p>When you leave your accommodation unit an exit fee will be payable.</p> <p>The Options are summarised over the page:</p>
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STANDARD OPTION

Standard Exit Fee

Our Standard Exit fee is 6% of the Ingoing Contribution per year for the first 6 years, calculated on a daily basis.

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	12 % of your ingoing contribution
5 years	30 % of your ingoing contribution
10 years	36 % of your ingoing contribution

CUSTOMISED OPTION

This option enables you and Brodribb Retirement Village to enter into a Residence Contract on terms which are similar to the Standard Option but which are customised to suit your particular circumstances.

Under this option:

- (a) you will pay an ingoing contribution;
- (b) the exit fee will be calculated as a percentage of the Ingoing Contribution that you pay (the Exit Fee Percentage)
- (c) the Exit Fee Percentage will be calculated on a daily basis and will increase for each day until you leave the village but the Exit Fee Percentage will only accumulate to the maximum agreed by you and Brodribb Retirement Village in your customised contract;
- (d) your Ingoing Contribution and your Exit Fee will be as agreed by you and Brodribb Retirement Village in your customised contract; and
- (e) if this option applies, the Exit Fee will be the amount calculated in accordance with your customised contract.

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 for the Standard Licence is 36% of the ingoing contribution after 6 years of residence. The maximum (or capped) possible exit fee for the Customised Licence is 96% after 6 years.

The minimum exit fee is 0.165% for the Standard Licence and may be less for the Customised Licence depending on terms negotiated.

<p>11.2 What other exit costs do residents need to pay or contribute to?</p>	<p><input type="checkbox"/> Sale costs for the unit</p> <p><input type="checkbox"/> Legal costs</p> <p><input checked="" type="checkbox"/> Other costs - Termination Administration Cost of \$2,000</p>
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Part 12 – Reinstatement and renovation of the unit

<p>12.1 Is the resident responsible for reinstatement of the unit when they leave the unit?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p><i>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:</i></p> <ul style="list-style-type: none"> • <i>fair wear and tear; and</i> • <i>renovations and other changes to the condition of the unit carried out with agreement of the resident and operator.</i> <p><i>Fair wear and tear include 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.</i></p> <p>Entry and exit inspections and reports are undertaken by the operator and resident to assess the condition of the unit.</p>
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<p>12.2 Is the resident responsible for renovation of the unit when they leave the unit?</p>	<p><input type="checkbox"/> Yes, all residents pay % of any renovation costs (in same proportion as the share of the capital gain on the sale of their 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

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 the resident's share of the OR is based on a formula **capital gain** is %
capital loss is %
[specify]
- Optional - residents can elect to share in a capital **gain** or **loss** option
the resident's share of the the resident's share of the OR is based on a formula **capital gain** is %
capital loss is %
[specify]
- No

Part 14 – Exit entitlement

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?

Exit entitlement =

Your Ingoing Contribution

Less Exit Fee

Less Termination Administration Cost

Less Any Applicable Reinstatement Costs (refer 12.1)

Less Any General services charges outstanding

Less Any Maintenance Reserve Fund Fees outstanding

Less Any Personal Service Charges outstanding

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 which is 9 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
- 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.

<p>14.3 What is the turnover of units for sale in the village?</p>	<p>0 accommodation unit was vacant as at the end of the last financial year</p> <p>9 accommodation units were resold during the last financial year</p> <p>2.26 months was the average length of time to sell a unit over the last three financial years</p>
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Part 15– Financial management of the village

<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>	<table border="1"> <tr> <td colspan="3" data-bbox="480 501 1509 577"> <p>General Services Charges for the last 3 years (note 2020/21 figures are not yet available)</p> </td> </tr> <tr> <td data-bbox="480 577 751 651">Financial Year</td> <td data-bbox="751 577 1110 651">Deficit/Surplus</td> <td data-bbox="1110 577 1509 651">Change from previous year</td> </tr> <tr> <td data-bbox="480 651 751 689">2019/20</td> <td data-bbox="751 651 1110 689">\$3443</td> <td data-bbox="1110 651 1509 689">3.82 %</td> </tr> <tr> <td data-bbox="480 689 751 728">2018/19</td> <td data-bbox="751 689 1110 728">-\$802</td> <td data-bbox="1110 689 1509 728">2.02 %</td> </tr> <tr> <td data-bbox="480 728 751 766">2017/18</td> <td data-bbox="751 728 1110 766">\$9036</td> <td data-bbox="1110 728 1509 766">1.76 %</td> </tr> <tr> <td colspan="2" data-bbox="480 766 1110 875"> <p>Balance of Maintenance Reserve Fund for last financial year <i>OR</i> last quarter if no full financial year available</p> </td> <td data-bbox="1110 766 1509 875"> <p>\$ 47,961</p> </td> </tr> <tr> <td colspan="2" data-bbox="480 875 1110 985"> <p>Balance of Capital Replacement Fund for the last financial year <i>OR</i> last quarter if no full financial year available</p> </td> <td data-bbox="1110 875 1509 985"> <p>\$418,048</p> </td> </tr> <tr> <td colspan="2" data-bbox="480 985 1110 1133"> <p>Percentage of a resident ingoing contribution applied to the Capital Replacement Fund</p> </td> <td data-bbox="1110 985 1509 1133"> <p>7 %</p> </td> </tr> <tr> <td colspan="3" data-bbox="480 1133 1509 1391"> <p>The operator pays a percentage of a resident’s ingoing contribution, as determined by a quantity surveyor’s report, to the Capital Replacement Fund. This fund is used for replacing the village’s capital items.</p> </td> </tr> <tr> <td colspan="3" data-bbox="480 1391 1509 1556"> <p>OR</p> <p><input type="checkbox"/> the village is not yet operating.</p> </td> </tr> </table>	<p>General Services Charges for the last 3 years (note 2020/21 figures are not yet available)</p>			Financial Year	Deficit/Surplus	Change from previous year	2019/20	\$3443	3.82 %	2018/19	-\$802	2.02 %	2017/18	\$9036	1.76 %	<p>Balance of Maintenance Reserve Fund for last financial year <i>OR</i> last quarter if no full financial year available</p>		<p>\$ 47,961</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>\$418,048</p>	<p>Percentage of a resident ingoing contribution applied to the Capital Replacement Fund</p>		<p>7 %</p>	<p>The operator pays a percentage of a resident’s ingoing contribution, as determined by a quantity surveyor’s report, to the Capital Replacement Fund. This fund is used for replacing the village’s capital items.</p>			<p>OR</p> <p><input type="checkbox"/> the village is not yet operating.</p>		
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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 of their unit only

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?

[Note: Delete the following if this does not apply]

If yes: provide details including, length of period, relevant time frames and any costs or conditions

Yes No

.....
.....
.....
.....
.....

Pets

17.2 Are residents allowed to keep pets?

[Note: Delete the following if this does not apply]

If yes: specify any restrictions or conditions on pet ownership

Yes No

All pets are subject to approval by the scheme operator. Limit of one cat or dog per unit.

Visitors

<p>17.3 Are there restrictions on visitors staying with residents or visiting? <i>[Note: Delete the following if this does not apply]</i> If yes: specify any restrictions or conditions on visitors (e.g. length of stay, arrange with manager)</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Except for temporary visits of less than one (1) month in any twelve (12) month period, consent must be obtained from the Scheme Operator. In addition the Resident must ensure that visitors comply with the matters contained in Residential Agreement of the Village and do not interfere with the rights and enjoyment of other residents of the Village.</p>
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Village by-laws and village rules

<p>17.4 Does the village have village by-laws?</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>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.</i> <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

<p>17.6 Does the village have a residents committee established under the Retirement Villages Act 1999?</p>	<p><input type="checkbox"/> Yes <input checked="" 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> <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

<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: <i>[specify]</i>..... </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

19.1 Does the village maintain a waiting list for entry?

[Note: Delete the following if this does not apply]

If yes,

- what is the fee to join the waiting list?

Yes No

No fee

Fee of \$..... which is

refundable on entry to the village

non-refundable

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).

[Note: Mark which applies with an X]

- 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
- 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 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

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 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

Website: 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

Website: 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

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: <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
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

Liveable Housing Australia (LHA)

The Liveable 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/