

Village Comparison Document

Retirement Villages Act 1999 (Section 74)

This form is effective from 1 February 2019

ABN: 86 504 771 740



Carinity Lifestyle – Shalom

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.carinity.org.au/retirement/shalom/
- 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 1 July 2022 and applies to prospective residents.

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

Part 1 – Operator and management details

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| 1.1 Retirement village location | Retirement Village Name: Carinity Lifestyle – Shalom Street Address: 121 Maloney Street Suburb: North Rockhampton State: QLD Post Code: 4701 |
| 1.2 Owner of the land on which the retirement village scheme is located | Name of land owner: The Baptist Union of Queensland Australian Business Number (ABN): 59 241 212 544 Address: 53 Prospect Road Suburb: Gaythorne State: QLD Post Code: 4051 |
| 1.3 Village operator | Name of entity that operates the retirement village (scheme operator) The Baptist Union of Queensland – Carinity Australian Business Number (ABN): 46 909 844 617 Address: 53 Prospect Road Suburb: Gaythorne State: QLD Post Code: 4051 Date entity became operator: 1 September 1985 |

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| <p>1.4 Village management and onsite availability</p> | <p>Name of village management entity and contact details</p> <p>The Baptist Union of Queensland – Carinity</p> <p>Australian Business Number (ABN): 46 909 844 617</p> <p>Phone 1300 109 109</p> <p>Email: retirement@carinity.org.au</p> <p>An onsite manager (or representative) is available to residents:</p> <p><input checked="" type="checkbox"/> Full Time</p> <p>Onsite availability includes:</p> <p>Weekdays: Monday – Friday 8.00am -5.00pm</p> <p>Weekends: No Availability</p> |
| <p>1.5 Approved closure plan or transition plan for the retirement village</p> | <p>Is there an approved transition plan for the village?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>A written transition plan approved by the Department of Housing and Public Works is required when an existing operator is transitioning control of the retirement village scheme’s operation to a new operator.</i></p> <p>Is there an approved closure plan for the village?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><i>A written closure plan approved by the residents of the village (by a special resolution at a residents meeting) or by the Department of Housing and Public Works is required if an operator is closing a retirement village scheme. This includes winding down or stopping to operate the village, even temporarily.</i></p> |
| <p>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?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> |

Part 2 – Age limits

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| 2.1 What age limits apply to residents in this village? | <p>Retirees over the age of 70 may apply for admission.</p> <p>In the case of a married couple, only one spouse needs to be in this category. Applicants will need to show that they are physically able to cope with independent unit living.</p> |
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ACCOMMODATION, FACILITIES AND SERVICES

Part 3 – Accommodation units: Nature of ownership or tenure

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

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| 3.2 Number of units by accommodation type and tenure | <p>There are ...45... units in the village, comprising ...45...single story units; ...0... units in multi-story building with ...1... levels</p> |
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| Accommodation unit | Freehold | Leasehold | Licence | Other |
|--------------------------|----------|-----------|---------|-------|
| Independent living units | | | | |
| - Studio | | | | |
| - One bedroom | | | 06 | |
| - Two bedroom | | | 35 | |
| - Three bedroom | | | 04 | |
| Serviced units | | | | |
| - Studio | | | | |
| - One bedroom | | | | |
| - Two bedroom | | | | |
| - Three bedroom | | | | |
| Other | | | | |
| Total number of units | | | 45 | |
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Access and design

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| 3.3 What disability access and design features do the units | <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 |
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| <p>and the village contain?</p> | <p><input type="checkbox"/> Alternatively, a ramp, elevator or lift allows entry into <input type="checkbox"/> all <input type="checkbox"/> some units</p> <p><input checked="" type="checkbox"/> Step-free (hobless) shower in <input checked="" type="checkbox"/> all</p> <p><input type="checkbox"/> Width of doorways allow for wheelchair access in <input type="checkbox"/> all <input type="checkbox"/> some units</p> <p><input type="checkbox"/> Toilet is accessible in a wheelchair in <input type="checkbox"/> all <input type="checkbox"/> some units</p> <p><input checked="" type="checkbox"/> Other key features in the units or village that cater for people with disability or assist residents to age in place</p> <p>...Grab rails in the bathroom.....</p> <p><input type="checkbox"/> None</p> |
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Part 4 – Parking for residents and visitors

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| <p>4.1 What car parking in the village is available for residents?</p> | <p><input checked="" type="checkbox"/> All units with own garage or carport attached or adjacent to the unit</p> |
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| <p>4.2 Is parking in the village available for visitors?</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>34 units of the 45 have space in front of their unit where a visitor can park, Units that have a separate garage to the unit have access for their visitors to a neighbouring street for short term parking. Minimal parks available in the general area that is available for slightly longer period of time or overnight.</p> |
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Part 5 – Planning and development

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| <p>5.1 Is construction or development of the village complete?</p> | <p>Year village construction started ...1985...</p> <p><input checked="" type="checkbox"/> Fully developed / completed</p> <p><input type="checkbox"/> Partially developed / completed</p> <p><input type="checkbox"/> Construction yet to commence</p> |
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| <p>5.2 Construction, development applications and development approvals</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>...No development planned.....</p> |
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| <p>5.3 Redevelopment plan under the</p> | <p>Is there an approved redevelopment plan for the village under the <i>Retirement Villages Act?</i></p> |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------|

| | |
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| Retirement Villages Act 1999 | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Note: see notice at end of document regarding inspection of the development approval documents. |
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Part 6 – Facilities onsite at the village

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| 6.1 The following facilities are currently available to residents: | <input checked="" 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 checked="" 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 checked="" 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 - Outdoor not heated <input type="checkbox"/> Separate lounge in community centre <input type="checkbox"/> Spa [indoor / outdoor] [heated / not heated] <input type="checkbox"/> Storage area for boats / caravans <input type="checkbox"/> Tennis court [full/half] <input type="checkbox"/> Village bus or transport <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).

... Hairdressing services are available for pre-booked appointments on a user pay basis. The Community Pavilion is a shared facility which is available to all residents except when individual bookings are made....

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| 6.2 Does the village have an onsite, attached, adjacent or co-located residential aged care facility? | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Name of residential aged care facility and name of the approved provider ... Shalom Aged Care- Carinity |
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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

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

Management and Administration of the Village;

Reception

Maintenance of gardens, as established by the Scheme operator;

Cleaning and minor maintenance of community recreation and entertainment facilities;

Emergency Call system and monitoring;

Periodic standard pest control treatment of Units;

Council and Water Rates;

Buildings Insurance;

Electricity to common areas.

7.2 Are optional personal services provided or made available to residents on a user-pays basis?

Yes No

Personal Care;

Clinical Consultation/nursing care;

Cleaning;

Maintenance/Domestic services.

7.3 Does the retirement village operator provide government funded home care services under the *Aged Care Act 1997 (Cwth)*?

Yes, the operator is an Approved Provider of home care under the *Aged Care Act 1997* (Registered Accredited Care Supplier – RACS ID number 18227)

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

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| 8.1 Does the village have a security system? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| 8.2 Does the village have an emergency help system? If yes or optional: • the emergency help system details are: the emergency help system is monitored between: | <input checked="" type="checkbox"/> Yes - all residents <input type="checkbox"/> Optional <input type="checkbox"/> No The emergency call system and emergency response is provided through an independent, external provider. Connection to a telephone network, at residents cost, may be needed to access the emergency call system. 24 hours a per day, 7 days per week. |
| 8.3 Does the village have equipment that provides for the safety or medical emergency of residents? If yes, list or provide details e.g. first aid kit, defibrillator | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No First Aid Kit is available at Reception and in the Community Pavilion |

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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| 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 | \$...170,000..... to \$...190,000..... |
| | - Two bedrooms | \$...200,000..... to \$...285,000..... |
| | - Three bedrooms | \$...300,000..... to \$...300,000..... |
| | Serviced units | |
| | - Studio | \$ to \$..... |
| | - One bedroom | \$ to \$..... |
| | - Two bedrooms | \$ to \$..... |
| | - Three bedrooms | \$ to \$..... |
| | Other | \$ to \$..... |
| | Full range of ingoing contributions for all unit types | \$...170,000..... to \$...300,000..... |

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| <p>859.2 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.</p> | <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>...Exit fee is calculated as follows: The Ingoing Contribution less 6% per annum of the Ingoing Contribution for the first 3 years, then 4% per annum for the following 3 years (calculated on a daily pro rata basis for any part year) that you reside in the unit up to a maximum of six years.</p> |
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| <p>9.3 What other entry costs do residents need to pay?</p> | <p><input type="checkbox"/> Transfer or stamp duty <input type="checkbox"/> Costs related to your residence contract <input type="checkbox"/> Costs related to any other contract e.g. <input type="checkbox"/> Advance payment of General Services Charge</p> <p><input checked="" type="checkbox"/> Other costs ...- Scheme Operators fee of \$200.00 for the preparation of the Residence Contract and other associated documentation. This fee is refunded when you pay your Ingoing Contribution/Negotiated Ingoing Contribution, however, if you decide you do not want to proceed, the fee is not refundable.....</p> |
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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 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 | | |
| - One bedroom | \$ 85.01 | \$ 14.64 |
| - Two bedrooms | \$ 90.18 to \$ 95.75 | \$ 23.84 to \$ 29.15 |
| - Three bedrooms | \$ 96.70 | \$ 31.70 |

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 | \$85.01 to \$96.70 | 0% | \$14.74 to \$31.70 | 11.9% |
| 2021/22 | \$ 85.01 to \$ 96.79 | +1.16% | \$ 13.17 to \$ 28.51 | +5.36% |
| 2020/21 | \$ 84.03 to \$ 96.23 | - 0.7 % | \$ 12.50 to \$ 27.75 | +5.0 % |

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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 type="checkbox"/> Unit fixtures <input type="checkbox"/> Unit fittings <input type="checkbox"/> Unit appliances <input checked="" type="checkbox"/> None Additional information |
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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 If the resident advises of any repairs, etc, Carinity will arrange for such works through the Village Maintenance Reserve fund. |
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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 permanently leave their unit? | <input checked="" type="checkbox"/> Yes – all residents pay an exit fee calculated using the same formula <input type="checkbox"/> Yes – all new residents pay an exit fee but the way this is worked out may vary depending on each resident's residence contract <input type="checkbox"/> No exit fee <input type="checkbox"/> Other |
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| <p>If yes: list all exit fee options that may apply to new contracts</p> | <p>Exit fee is calculated as follows: The Ingoing Contribution less 6% per annum of the Ingoing Contribution for the first 3 years, then 4% per annum for the following 3 years (calculated on a daily pro rata basis for any part year) that you reside in the unit up to a maximum of six years.</p> <p>Example of the Exit Entitlement payable on an Ingoing Contribution of \$200,000 is listed below. However, the Ingoing Contribution given is an example only and the Exit fee will be calculated on the actual Ingoing Contribution paid.</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>Ingoing Contribution Of \$</th> <th>Exit fee. Year 1 \$</th> <th>Exit fee. Year 2 \$</th> <th>Exit Fee. Year 3 \$</th> <th>Exit Fee. Year 4 \$</th> <th>Exit Fee. Year 5 \$</th> <th>Exit Fee. Year 6 \$</th> </tr> </thead> <tbody> <tr> <td>\$200,000</td> <td>12,000</td> <td>24,000</td> <td>36,000</td> <td>44,000</td> <td>52,000</td> <td>60,000</td> </tr> </tbody> </table> | Ingoing Contribution Of \$ | Exit fee. Year 1 \$ | Exit fee. Year 2 \$ | Exit Fee. Year 3 \$ | Exit Fee. Year 4 \$ | Exit Fee. Year 5 \$ | Exit Fee. Year 6 \$ | \$200,000 | 12,000 | 24,000 | 36,000 | 44,000 | 52,000 | 60,000 |
|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------|--------|--------|--------|--------|--------|--------|
| Ingoing Contribution Of \$ | Exit fee. Year 1 \$ | Exit fee. Year 2 \$ | Exit Fee. Year 3 \$ | Exit Fee. Year 4 \$ | Exit Fee. Year 5 \$ | Exit Fee. Year 6 \$ | | | | | | | | | |
| \$200,000 | 12,000 | 24,000 | 36,000 | 44,000 | 52,000 | 60,000 | | | | | | | | | |

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| <p>Time period from date of occupation of unit to the date the resident ceases to reside in the unit</p> | <p>Exit fee calculation based on</p> <ul style="list-style-type: none"> • your ingoing contribution |
| 1 year | 6 % of your ingoing contribution |
| 2 years | 12 % of your ingoing contribution |
| 3 years | 18 % of your ingoing contribution |
| 4 years | 22 % of your ingoing contribution |
| 5 years | 26 % of your ingoing contribution |
| 6 years | 30 % 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.</p> <p>The maximum (or capped) exit fee is 30 % of the ingoing contribution after 6 years of residence.</p> <p>The minimum exit fee is 6% of the ingoing contribution (assuming a full 1st year of occupancy but calculated on a daily pro rata basis for any part year)</p> | |

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| <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 checked="" type="checkbox"/> Legal costs</p> <p>In the event of your death, any cost we may incur in satisfying our solicitors as to the validity of any claim for payment of the Exit Entitlement to your estate. (This may be \$400-\$800 plus GST)</p> <p><input checked="" type="checkbox"/> Other costs - General service fees up to 90 days from the date of vacant possession, or until the Unit is sold, whichever is sooner. If the</p> |
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right to reside is not sold at the end of 90 days, you and the scheme operator will share the total general service charge, for the remaining period up to nine calendar months from the vacate date or until the right to reside is sold, whichever is the sooner, in the same proportion that you share the gross incoming contribution from the new resident.

Cost of thoroughly cleaning the Unit including shampooing of carpets

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 unit when they leave the unit?

No

Renovation means replacements or repairs other than reinstatement work.

By law, the operator is responsible for the cost of any renovation work on a former resident's unit, unless the residence contract provides for the resident to share in the capital gain on the sale of the resident's interest in the unit. Renovation costs are shared between the former resident and operator in the same proportion as any capital gain is to be shared under the residence contract.

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?

No

Part 14 – Exit entitlement or buyback of freehold units

An exit entitlement is the amount the operator may be required to pay the former resident under a residence contract after the right to reside is terminated and the former resident has left the unit.

14.1 How is the exit entitlement which the operator will pay the resident worked out?

The scheme operator will repay the ingoing contribution (paid to the scheme operator on entry) to the resident, less 6% per annum of the Ingoing Contribution for the first 3 years and 4% per annum for the following 3 years (and calculated on a daily pro rata basis for any part year) that you reside in the unit up to a maximum of 6 years.

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

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.

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

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

4 accommodation units were resold during the last financial year

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

Part 15 – Financial management of the village

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

| General Services Charges Fund for the last 3 years | | | |
|-----------------------------------------------------------------------------------------------------------------------------|------------------|----------------------------------------------------------------|---------------------------|
| Financial Year | Deficit/ Surplus | Total general service charges collected for the financial year | Change from previous year |
| 2020/21 | Surplus \$12,235 | \$208,818 | 98.91% |
| 2019/20 | Surplus \$6,151 | \$212,558 | 196 % |
| 2018/19 | Deficit \$6,395 | \$201,467 | 73.8 % |
| Balance of General Services Charges Fund for last financial year OR last quarter if no full financial year available | | | \$12,235 |
| Balance of Maintenance Reserve Fund for last financial year OR last quarter if no full financial year available | | | \$ 50,844 |

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| | <p>Balance of Capital Replacement Fund for the last financial year <i>OR</i> last quarter if no full financial year available</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>\$ 517,395</p> <p>The scheme operator, giving regard to the Quantity Surveyor's annual CRF report, will calculate the annual contribution required to cover the estimated expenditure for the year. One twelfth of this contribution will be deposited to the CRF each calendar month.</p> |
| <p>OR <input type="checkbox"/> the village is not yet operating.</p> | | |

Part 16 – Insurance

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

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

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

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| <p>16.1 Is the resident responsible for arranging any insurance cover? If yes, the resident is responsible for these insurance policies:</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, the resident is responsible for these insurance policies:</p> <p>...Contents Insurance.....</p> <p>...Personal valuables Insurance.....</p> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Part 17 – Living in the village

Trial or settling in period in the village

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|--------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| <p>17.1 Does the village offer prospective residents a trial period</p> | <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> |
|--------------------------------------------------------------------------------|------------------------------------------------------------------------------|

| | |
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| <p>or a settling in period in the village?</p> | |
| <p>Pets</p> | |
| <p>17.2 Are residents allowed to keep pets? If yes: specify any restrictions or conditions on pet ownership</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Residents may have a bird in a cage, or fish in a tank, and where approved, a "guide dog". No other pets are allowed.</p> |
| <p>Visitors</p> | |
| <p>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)</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Friends or relatives may visit at any time, but overnight stays and holidays should not exceed a total of 6 weeks in any calendar year without the approval of Carinity. If a visitor/s stays overnight or for short holidays, residents should advise the Manager during office hours, so that in the event of an emergency, correct number of persons in the village can be ascertained at that time.</p> |
| <p>Village by-laws and village rules</p> | |
| <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 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> |
| <p>17.5 Does the operator have other rules for the village.</p> | <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes: Rules may be made available on request</p> |
| <p>Resident input</p> | |
| <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> <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> |
| <p>Part 18 – Accreditation</p> | |
| <p>18.1 Is the village voluntarily accredited through an industry-</p> | <p><input checked="" type="checkbox"/> No, village is not accredited <input type="checkbox"/> Yes, village is voluntarily accredited through:</p> |

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| based accreditation scheme? | |
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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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|-----------------------------------------------------------------|---------------------------------------------------------------------|
| 19.1 Does the village maintain a waiting list for entry? | <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
|-----------------------------------------------------------------|---------------------------------------------------------------------|

Access to documents

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

- Certificate of registration for the retirement village scheme
- Certificate of title or current title search for the retirement village land
- Village site plan
- Plans showing the location, floor plan or dimensions of accommodation units in the village
- Plans of any units or facilities under construction
- Development or planning approvals for any further development of the village
- An approved redevelopment plan for the village under the *Retirement Villages Act*
- An approved transition plan for the village
- An approved closure plan for the village
- The annual financial statements and report presented to the previous annual meeting of the retirement village
- Statements of the balance of the capital replacement fund, or maintenance reserve fund or general services charges fund (or income and expenditure for general services) at the end of the previous three financial years of the retirement village
- Statements of the balance of any Body Corporate administrative fund or sinking fund at the end of the previous three years of the retirement village
- Examples of contracts that residents may have to enter into
- Village dispute resolution process
- Village by-laws
- Village insurance policies and certificates of currency
- A current public information document (PID) continued in effect under section 237I of the Act (this applies to existing residence contracts)

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

Further Information

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

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

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/