

Burwood Heights Retirement Village Factsheet

Factsheet for mixed tenure retirement village

Under the *Retirement Villages Act 1986*, all retirement villages operating in Victoria must give this factsheet to a retiree (or anyone acting on their behalf) within seven days of a request, and include it in any marketing material provided to them and intended to promote a particular village.

Make sure you read and understand each section of this document before you sign a contract to live in this village.

Consumer Affairs Victoria suggests that before you decide whether to live in a retirement village, you should:

- seek independent 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 entry costs, ongoing charges and financial liabilities on permanent departure (covered in sections 9 and 10 of this document)
- 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
- review the *Guide to choosing and living in a retirement village*.

The Guide and other general information about retirement living is available on Consumer Affairs Victoria's website at:
www.consumer.vic.gov.au/housing/retirement-villages.

All amounts in this factsheet are GST-inclusive, unless stated otherwise where that is permitted by law.

1. Location

Name and address of retirement village:

Burwood Heights Retirement Village
2 Barry Rd Burwood East 3151

2. Ownership

2.1 Name and address of the owner of the land on which the retirement village facilities are located (company /organisation/owners corporation):

The Uniting Church in Australia Property Trust (Victoria & Tasmania)

130 Little Collins Street, Melbourne 3000
ABN: 39 703 442 583

2.2 Year construction started:

1971

3. Management

3.1 • Name of company or organisation that manages the retirement village:

Uniting (Victoria & Tasmania) Limited

• ABN:

81 098 317 125

• Address:

Level 6, 250 Victoria Parade, East Melbourne 3002

• Telephone number:

(03) 9051 3000

• Date company or organisation became manager:

11th January 2007

Previously Burwood Heights Uniting Church

3.2 Is there an onsite representative of the manager available for residents?

Yes No

4. Nature of ownership or tenure

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

- Lease (non-owner resident)

5. Number and size of residential options

5.1	Number of units by accommodation type:	<ul style="list-style-type: none">• 8 two bedroom units• 8 in total
5.2	Garages, carports or car parks:	<p><input checked="" type="checkbox"/> Each unit has its own garage or carport</p> <ul style="list-style-type: none"><input type="checkbox"/> attached to the unit<input checked="" type="checkbox"/> separate from the unit. <p><input type="checkbox"/> Each unit has its own car park space</p> <ul style="list-style-type: none"><input type="checkbox"/> adjacent to the unit<input type="checkbox"/> separate from the unit. <p><input type="checkbox"/> General car parking is available in the village for residents and visitors.</p> <p><input type="checkbox"/> Other (<i>specify</i>)</p> <p><input type="checkbox"/> No garages, carports or car parking are provided.</p>

6. Planning and development

Has planning permission been granted for further development of the village? Yes No

7. Facilities onsite at the village

7.1 The following facilities are available to residents as at the date of this statement.

Note: If the cost for any facility is not funded from the recurrent service charge paid by residents or there are any restrictions on access, a list is attached with the details.

- No onsite facilities are provided, however the village is 50 metres from Burwood One Shopping Centre with extensive facilities, cafes and shops. The tram, bus and local Church are also 50 metres away.

7.2 Does the village have an onsite or attached residential or aged care facility? Yes No

Note: The retirement village owner or manager cannot keep places free for residents. To enter a residential or aged care facility, you must be assessed as eligible through an aged care assessment in accordance with the Commonwealth *Aged Care Act 1997*.

8. Services

- 8.1 Services provided to all village residents (funded from the recurrent service charge paid by residents):
- annual auditing of village accounts
 - cleaning and maintenance of communal areas and facilities
 - maintenance and care of communal lawns and gardens
 - management and administration services
 - payment of all rates, taxes and charges for the communal areas and village facilities including gas, water and electricity
 - repairs and maintenance to all units including fixed appliances
 - payment of council rates and charges for all units
 - payment of water service charges and usage for individual units
 - after hours on-call staff able to attend to agreed emergency maintenance
 - A commitment to provision and maintenance of all services and facilities that comply with or exceed required safety standards and undergo regular inspections

In addition,

- staff who will always be willing to listen to your concerns
- staff available to respond to your telephone requests in a responsive and professional manner
- staff willing to assist you locate personal support services you may require as your needs change over time
- our commitment to engage with you in a respectful and friendly way in everything we do

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

Yes No

If yes, the list of current services and fees is attached.

- 24hr emergency monitoring system. Monthly monitoring fee applies

- Gardening of resident's private courtyards. Fee applies

9. Entry costs and departure entitlement

9.1 The resident must pay:	<ul style="list-style-type: none"> • a refundable in-going contribution • a non-refundable in-going contribution
9.2 If the resident must pay a refundable in-going contribution:	<ul style="list-style-type: none"> • the range is: <p>Level 1. \$165,000 - (assets less than \$245,000 in cash, shares, superannuation or property)</p> <p>Level 2. \$220,000 - (assets greater than \$245,000 but less than \$490,000 in cash, shares, superannuation or property)</p> <p>Level 3. \$340,000 - (assets greater than \$490,000 in cash, shares, superannuation or property)</p> <p>It is refunded:</p> <ul style="list-style-type: none"> • within 14 days of the next resident taking possession of the unit • within 14 days of receipt of the next in-going contribution • within six months of permanent departure, whichever is earlier.
9.3 If the resident must pay a refundable in-going contribution, is a fee deducted at permanent departure?	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, the departure fee is based on:</p> <p>Level 1. 15% per annum - until consumed: Level 2. 10% per annum - for a maximum number of 6 years of residence: Level 3. 5% per annum - for a maximum number of 6 years of residence:</p> <ul style="list-style-type: none"> • of your in-going contribution
9.4 If the resident must pay a non-refundable in-going contribution, the amount is:	<ul style="list-style-type: none"> • \$1,000 for Establishment Administration Costs (payable at commencement)
9.5 These costs must be paid by the resident on permanent departure, or are deducted	<ul style="list-style-type: none"> • A contribution to the long-term maintenance fund of: • \$2,000 per annum - for a maximum of 5 years of residence

from the refundable in-going contribution:	<ul style="list-style-type: none"> Renovation of the interior surfaces of your unit
9.6 The estimated sale price ranges for all classes of units in the village (on a reinstated or renovated basis) as at 1 st October 2018 are:	<ul style="list-style-type: none"> 2 bedroom unit: \$165,000 to \$340,000

10. Ongoing charges

10.1 The current rates of ongoing charges for new residents:	
Type of unit	Service charge
Self-contained unit:	<ul style="list-style-type: none"> \$290.09 per fortnight

11. Financial management of the village

11.1	<ul style="list-style-type: none"> The village operating surplus or deficit for the last financial year is: 	\$15,845 deficit (associated with residents who are on inherited pre 2007 contracts. This will continue to be financed by Uniting from cash reserves for the length of the inherited contracts).
11.2	Does the village have a long-term maintenance fund?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	If yes:	\$16,063
	<ul style="list-style-type: none"> the balance of the maintenance fund at the end of the last financial year was: 	

12. Capital gains or losses

If the unit is sold, does the resident share in any capital gain or loss?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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13. Reinstatement or renovation of the unit

Is the resident responsible for reinstatement or renovation of the unit on permanent departure?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If you pay level 2 or 3 Ingoing Contribution For renovation <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If you pay level 1 Ingoing Contribution
If yes, the resident must pay for:	<ul style="list-style-type: none"> Patching and painting any marked surfaces

- Cleaning or replacement of floor coverings (e.g. carpet and vinyl)
 - Cleaning or replacement of all kitchen surfaces and appliances
 - Cleaning or replacement of all bathroom and laundry surfaces
 - Repair or replacement of any damaged fitting or fixture within unit
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- Whether to clean or replace depends on if cleaning will return the item to an as new state that would appeal to a new resident. Surfaces that are worn or damaged will generally need replacement.

14. Insurance

15.1 Is the village owner or manager responsible for arranging any insurance cover for the village? Yes No

If yes, the village owner or manager is responsible for these insurance policies:

- Buildings Cover
- Public Liability Cover

15.2 Is the resident responsible for arranging any insurance cover? Yes No

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

- Contents Cover on their possessions, if they wish.

15. Security

Does the village have a security system? Yes No

16. Emergency system

Does the village have an emergency help system? Yes No

If yes:

- the emergency help system details are:

Emergency help system available upon resident's request, via MEPACS. Resident responsible for monthly monitoring fee.

- the emergency help system is monitored between: 24 hours a day, 7 days a week.

17. Resident restrictions

- 18.1 Are residents allowed to keep pets? Yes No

If yes, any restrictions or conditions on pet ownership are available on request.

- 18.2 Are there restrictions on **residents'** car parking in the village? Yes No

If yes, details of parking restrictions are available on request.

- 18.3 Are there any restrictions on **visitors'** car parking in the village? Yes No

If yes, details of parking restrictions are available on request.

18. Accreditation

Is the village accredited:

- under the Lifemark Village Scheme (administered by The British Standards Institution and initiated by the Property Council of Australia)? Yes No
- by the Australian Retirement Village Association? Yes No
- under the International Retirement Community Accreditation Scheme (administered by Quality Innovation Performance and initiated by Leading Age Services Australia)? Yes No

19. Resident input

Does the village have a residents committee established under the *Retirement Villages Act 1986*?

Yes No

Being a small village, residents have chosen to not establish a formal committee, preferring to contact Harrison directly with any matter of concern. Residents are free to establish a committee at any time.

20. Waiting list

Does the village have a waiting list for entry? Yes No

If yes:

- what is the fee to join the waiting list?

- Fee of \$50

- is the waiting list fee refundable on entry to the village? Yes No

The following documents are in the possession or control of the owner or manager and can be inspected free of charge within seven days of a request (by law).

- Village site plan
- Plans of any units under construction
- The statutory statements and report presented to the previous annual meeting of the retirement village
- Statements of the balance of any capital works, capital replacement or maintenance fund at the end of the previous three financial years of the retirement village
- Examples of contracts that residents may have to enter into
- Planning permission for any further development of the village
- Village dispute resolution documents

Declaration: The information in this factsheet is correct as at *1st October 2018*.