

Checklist for Resident-Funded Retirement Villages

LIFESTYLE NEEDS AND ISSUES

- Why do you want to move to a retirement village? Have you considered the extent to which safety, security and personal issues may be answered by making modifications to your existing home?
- Have you checked all accommodation options available to you and talked them over with family, friends or support networks?
- Have you looked closely at the retirement village lifestyle images in advertisements, and questioned their compatibility with your needs?
- Visit as many villages as possible to see what they offer and get a feel of the atmosphere; would you be comfortable with it?
- Talk to residents, staff and managers as well as sales people when looking at a village. Make notes and compare results. How do the different villages rate? Visit the villages again - at a different time, day, or weather.
- Consider future needs; would your later needs be limited due to issues such as transport, location, proximity to services, friends, family, recreation if you move?

FINANCIAL AND LEGAL CONSIDERATIONS

- How much will I have to pay to become a resident?
- How much is the deposit to secure accommodation, and is it refunded if I decide not to become a resident?
- If I leave the village what refund am I entitled to? How soon after leaving will the refund be paid?
- Does the organisation have a registered trustee who will ensure that the refund will be paid, and that my financial rights are safe-guarded at all times?
- How much is the weekly or monthly service fee; how is it increased, and how frequently?
- What does the service fee cover and what does it not cover? Can I continue to afford it (especially if one of a couple dies)?
- What other costs are involved in becoming a resident e.g. solicitor's fees, stamp duty, insurance?
- What type of contract will I be entering into, e.g. strata title, leasehold? (A copy of contract must be provided with adequate time for perusal).
- If pension rebates are to be claimed by the owner or manager on my behalf, for example, council/water rates, will I receive all the benefits of the rebate?

MANAGEMENT & RESIDENT INVOLVEMENT

- How is the village managed?
- Is there a residents' committee? What part does it play in the administration of the village? What power does it have in future decisions affecting tenancy?
- What system does the village have for resolving any disputes?
- What are the arrangements for maintenance of units, community facilities and grounds?

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MANAGEMENT & RESIDENT INVOLVEMENT continued:

- Is there room for, and am I permitted to establish, my own private garden?
- What protection do I have if the village is sold to an organisation whose philosophy is at variance with the current management?
- Does the management or residents' committee issue regular financial statements, and what audits are undertaken?
- Does the management have readily available for residents use a copy of the Retirement Villages Act?

HEALTH & SECURITY CONSIDERATIONS

- Are there any medical or other eligibility requirements for residents in the village, and how are these assessed?
- What arrangements are there for times of ill health or need for hospitalisation?
- Is there staff on duty at all times? If so, what staff - nurse, manager?
- Is there an emergency call button system? If so, who responds to such calls?
- May I install my own personal alarm system to my family through a 24-hour monitor service?
- Does the village provide other amenities such as podiatry, physiotherapy, wheelchair access?
- **If a resident becomes unable to live independently, even with whatever types and amounts of personal care may be provided, does the management have the right to insist that the resident be cared for elsewhere? (The Act permits an owner to require a resident to leave if the care needed is not available to the village).**
- Will the management assist in making other arrangements if needed and requested?

VILLAGE LIFESTYLE

- Can I have guests staying? Are there any restrictions on number, length of stay?
- Does the village have accommodation for family members if a residents' unit does not?
- Can I have pets, and does this mean existing pets only, or does this include replacements?
- Does the village provide any communal transport, and at what cost?
- What type of public transport is available, and what is the timetable?
- Apart from the village facilities, what services are available to me from the local community? For example: library, recreational, meals-on-wheels, hospitals, doctors.
- Would I be happy sharing the village lifestyle, including its rules and regulations?
- Will I be close to relatives and friends, or could I become isolated?
- What recreational facilities are available, are there limits to using them, and are there any proposed alterations to them?
- Have the community facilities of the village been built? If not, what guarantee do I have that they will be built?
- Do community facilities meet my needs?