

# Schedule 1

## FORMS

### Form 1

#### *Retirement Villages Act 1992*

[r. 4]

#### **Information statement for prospective resident**

Under section 13(2) of the *Retirement Villages Act 1992* the owner of residential premises in a retirement village is required to provide the following information to a person at least 5 working days before that person enters into a residence contract.

**THE OWNER MUST ANSWER EACH OF THE FOLLOWING QUESTIONS IN WRITING BELOW EACH QUESTION —**

#### **Payment of premium and refund entitlement**

1. What premium and other costs are payable to enter the retirement village?
2. What is the refund entitlement if the residence contract is terminated and when is it to be paid? (Include any fees or commissions charged by the administering body on termination of the contract and detail the method used to make the determination.)
3. To enable me to compare the financial packages offered by different retirement villages, what would be the final return due after, say, 1, 2, 5 and 10 years.

#### **Charges for village operating costs**

4. What retirement village operating costs are charged to a resident? What are the components of those costs? What method or calculation is used to determine the resident's share of those costs and variations of those costs?
5. By what percentage did the village's operating costs payable by the residents increase during the previous financial year?
6. Can a resident be liable for any additional or extraordinary charges? If so, under what circumstances?

### **Budget surplus**

7. For what purpose, or purposes, may any budget surplus in the retirement village be applied?
8. Does a resident have any say in the purpose, or purposes, to which any budget surplus in the retirement village is to be applied? If so, what is the process for resident involvement in this decision?

### **Reserve funds**

9. Is there provision for a reserve fund to pay for repairs, replacements, maintenance and renovations within the retirement village? If not, what are the arrangements for the carrying out of, and the funding of, such works?
10. What, if any, contribution does a resident make to any reserve fund? What method or calculation is used to determine any resident contribution?

### **Resident funded capital improvements**

11. What are the rights of a resident to compensation for capital improvements made to the residential premises at the resident's expense?

### **Amenities and services**

12. What amenities and services are, or are to be, provided or made available by the administering body? What charges or fees are payable by a resident for those amenities and services and what is the basis for the future determination of those charges or fees? Are there any conditions that apply to a resident's access to, or use of, those amenities and services?
13. What optional amenities and services are, or are to be, provided or made available by the administering body and at what cost?

### **Existing service contract**

14. Is there a service contract already in existence that will bind a prospective resident? How can the service contract be varied or cancelled?

## **Insurance**

15. What insurance arrangements (including self-insurance arrangements) are in place or proposed for the retirement village? What village insurance costs are, or will be, payable by the residents?
16. What is, or will be, the extent of insurance cover (including self-insurance cover) in the event of the residential premises or the retirement village as a whole being damaged or totally destroyed?

## **Village management**

17. What are the qualifications and experience of the retirement village's senior management?
18. Can the administering body of the retirement village transfer or assign its management responsibilities and obligations to a third party? If so —

- What notice will be given to the residents of the transfer or assignment?
- What information will be given to the residents about the qualifications and experience of the party to whom the responsibilities and obligations are to be transferred or assigned?

19. Is the retirement village accredited under any established accreditation scheme that applies to the retirement village industry?
20. What arrangements, if any, exist for the appointment of a trustee or residents' representative to oversee the interests of the residents under the retirement village scheme?

## **Resident consultation**

21. What arrangements exist for a resident to participate in the administration of the retirement village, including the making of residence rules and the setting of charges for the village operating costs that are payable by the resident?
22. How can the rights and obligations of the administering body and the resident under the residence contract and related contracts be varied? What resident participation is required to effect such variations?

### **Resident voting rights**

23. If 2 or more residents occupy the same residential premises in the retirement village, is each resident entitled to vote on a matter that requires, or provides for, the consent of the residents of the village?
24. What are the rights of a resident of the retirement village to appoint a person to vote for the resident by way of a proxy vote?

### **Use of residential premises**

25. What restrictions are there on a resident's use of his/her residential premises and the retirement village amenities in regard to —

- having someone else live with him/her?
- having visitors, including short-stay guests?
- car parking?
- pets?

### **Spouse or de facto partner occupancy rights**

26. What effect does the death of a resident have on the right of a spouse or de facto partner residing with the resident to continue to occupy the residential premises?

### **Transport**

27. What type of public, private or village transport is available to residents?

### **Medical certificate requirements**

28. Does the prospective resident have to supply a medical certificate or report to certify his/her ability to live independently?
29. Will the prospective resident have to provide documentation of his/her medical condition and medications? If so, who will have access to it?

### **Emergency call procedures**

30. Is there an emergency call system? If so, when is it monitored? Who is responsible for responding to the calls?

31. In the event of an emergency who will be called and how will they gain access to the resident's residential premises?

32. If hospitalisation is required, where will a person normally be taken?

### **Hospitalisation**

33. If hospitalisation or nursing care is required, how long will the resident's residential premises be kept in the name of the resident?

34. In the event that hospitalisation or nursing care is required, what ongoing costs would the resident incur with his/her existing residential premises?

### **Moving**

35. What costs are associated with moving to and living in alternative accommodation within the retirement village?

36. In what circumstances would a resident be required to move to alternative accommodation within the retirement village or be transferred or relocated?

### **Village under construction**

37. If the residential premises in the retirement village are still under construction, can the prospective resident have input into the design, construction or furnishings of his/her premises?

### **Refund of deposit**

38. What entitlement does a prospective resident have to a refund of his/her deposit if the construction of the retirement village has not been commenced or completed?

### **Sale of village**

39. What protection does a resident have against a loss of rights (including accommodation rights) if the retirement village is sold to another organisation?

### **Restrictions on sale of residential premises**

40. Are there any restrictions on the sale of residential premises (e.g. sole agency)? What happens if there is a dispute over the sale price?

**Repair and refurbishment of residential premises**

41. Can a resident be liable to pay for the cost of any repair or refurbishment of residential premises? If so, under what circumstances?
42. What can a resident do if dissatisfied with a claim made by the administering body for payment of any repair or refurbishment of residential premises?

**Termination of contract**

43. Under what conditions can the residence contract in the retirement village be terminated and at what cost? (The conditions must include the procedures to be followed under the *Retirement Villages Act 1992* and any applicable code.)
44. What fees will be payable by a prospective resident or a resident on termination of the residence contract? (This must include who is responsible for ongoing village operating costs and other charges during a period of vacancy of the residential premises.)

Signature of owner:

Date:

[Form 1 inserted in Gazette 9 September 2003 p. 4047-52.]

**FORM 2**

*RETIREMENT VILLAGES ACT 1992*

NOTICE OF RIGHTS UNDER SECTIONS 13 AND 14 OF THE  
*RETIREMENT VILLAGES ACT 1992*

[section 13 (2)]

The rights you have under sections 13 and 14 of the *Retirement Villages Act 1992* are set out below.

The owner should give you this form at least 5 working days before you enter into a residence contract.

**UNDER SECTION 13 —**

1. a residence contract shall be in writing;
2. at least 5 working days before a person enters into a residence contract the owner shall cause to be given to that person —
  - (a) the information statement set out in Form 1 in Schedule 1 to the *Retirement Villages Regulations 1992* completed and signed by the owner;
  - (b) this notice;
  - (c) a copy of the residence rules; and
  - (d) a copy of any applicable code;
3. a residence contract is taken to include a warranty as to the correctness of the information contained in the information statement.

That warranty —

- (a) is subject to any written alteration made to the information statement made by the owner with the consent of the prospective resident on or before the signing of the residence contract by the owner;
- (b) prevails over any inconsistent contractual term.

**UNDER SECTION 14 —**

If a person has not entered into occupation of residential premises under a residence contract that person may rescind the residence contract —

- (a) at any time within 5 working days after the date of the contract; or
- (b) if the documents required to be provided under section 13 (2) are not provided — at any time before the expiration of 10 working days after the documents are provided.

A rescission of a residence contract must be carried out in accordance with section 75 of the *Retirement Villages Act 1992*.

**FORM 3**

*RETIREMENT VILLAGES ACT 1992*

[Regulation 7 (3) (a)]

**NOTICE TO FORMER RESIDENT AS TO DISPOSAL OF GOODS**

To .....  
(name of former resident)

of .....  
(forwarding address of former resident)

1. The residence contract in respect of the premises at.....  
was terminated on .....  
(insert date)

2. The following goods were left on the premises —  
.....  
(specify goods\*)

.....  
which were put into storage under regulation 7 (2) on .....  
(insert date)

3. Under regulation 7 (5), a person who has a lawful right to the goods may  
reclaim them upon paying to the administering body the reasonable costs  
incurred for removal and storage.

4. If the goods have not been reclaimed within 60 days after the date shown  
in paragraph 2 above —

(a) the administering body is required by the regulations to have them  
sold by public auction; and

(b) the administering body is entitled to receive from the proceeds of  
sale its costs.

.....  
(date) (signature of administering body)

.....  
(name of administering body)

.....  
(address of administering body)

\*NOTE: Under regulation 7 (1), an administering body need not store, but may  
remove and destroy —

- (a) perishable foodstuffs; and
- (b) goods whose value is less than the estimated cost of removal,  
storage and sale.



**FORM 4**

*RETIREMENT VILLAGES ACT 1992*

[Regulation 7 (3) (b)]

**NOTICE AS TO DISPOSAL OF GOODS**

1. A residence contract in respect of the premises at.....  
between .....  
as owner of the premises and .....  
as resident was terminated on .....
2. The following goods were left on the premises —  
.....  
which have been put into storage under regulation 7 (2) on .....
3. Under regulation 7 (5), a person who has a lawful right to the goods may  
reclaim them upon paying to the administering body the reasonable costs  
incurred for removal and storage.
4. If the goods have not been reclaimed within 60 days after the date shown  
in paragraph 2 above the administering body —
  - (a) is required by the regulations to have them sold by public auction;  
and
  - (b) is entitled to receive from the proceeds of sale its costs.

.....  
(date)

.....  
(signature of administering body)

.....  
(name of administering body)

.....  
(address of administering body)

*[Schedule 1 amended in Gazette 8 January 1993 pp.26-7;  
30 September 1998 pp.5506-9; 9 September 2003 p. 4047-52.]*

**Schedule 2**

[Regulation 10]

**FEES**

1.	Application to Tribunal —	\$
	(a) financially disadvantaged person	20
	(b) other persons	30