

## Burwood Heights Retirement Village Factsheet

**October 2023 : Uniting is no longer offering any new Lifetime Leasehold and Management contracts with an Ingoing Contribution for this Retirement Village.**

**As units become available for occupation, they will be made available for rent. For further enquiries, please contact Uniting Housing Services at [housingservices@vt.uniting.org](mailto:housingservices@vt.uniting.org) or 1800 329 133**

### **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](http://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
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## 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)  Level 2, 130 Lonsdale Street, Melbourne 3000 ABN: 39 703 442 583
2.2	Year construction started:	1971

## 3. Management

3.1	<ul style="list-style-type: none"><li>Name of company or organisation that manages the retirement village:</li><li>ABN:</li><li>Address:</li><li>Telephone number:</li><li>Date company or organisation became manager:</li></ul>	Uniting (Victoria & Tasmania) Limited  81 098 317 125  Level 4, 130 Lonsdale Street, Melbourne 3000  1800 329 133  11 January 2007 Previously Burwood Heights Uniting Church
3.2	Is there an onsite representative of the manager available for residents?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 4. Nature of ownership or tenure

Resident ownership or tenure of the units in the village are:	<ul style="list-style-type: none"><li>Lifetime Lease (for RV Contract resident)</li><li>A renewable rental lease in accordance with the Residential Tenancies Act 1997 (rental)</li></ul>
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## 5. Number and size of residential options

5.1	Number of units by accommodation type:	<ul style="list-style-type: none"><li>• 8 two bedroom units</li><li>• 8 in total</li></ul>
5.2	Garages, carports or carparks:	<p><input checked="" type="checkbox"/> Each unit has its own garage or carport <input type="checkbox"/> attached to the unit <input checked="" type="checkbox"/> separate from the unit.</p> <p><input type="checkbox"/> Each unit has its own car park space <input type="checkbox"/> adjacent to the unit <input type="checkbox"/> separate from the unit.</p> <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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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## 7. Facilities onsite at the village

7.1	The following facilities are available to residents as at the date of this statement.
<b>Note:</b> 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.	
<ul style="list-style-type: none"><li>• 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.</li></ul>	
7.2	Does the village have an onsite or attached residential or aged care facility? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<b>Note:</b> 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 <i>Aged Care Act 1997</i> .	

## 8. Services

<p>8.1 Services provided to all village residents (funded from the recurrent service charge paid by residents):</p>	<ul style="list-style-type: none"><li>• annual auditing of village accounts</li><li>• cleaning and maintenance of communal areas and facilities</li><li>• maintenance and care of communal lawns and gardens</li><li>• management and administration services</li><li>• payment of all rates, taxes and charges for the communal areas and village facilities including gas, water and electricity</li><li>• repairs and maintenance to all units including fixed appliances</li><li>• payment of council rates and charges for all units</li><li>• payment of water service charges and usage for individual units</li><li>• A commitment to provision and maintenance of all services and facilities that comply with or exceed required safety standards and undergo regular inspections</li></ul>
<p>In addition,</p>	<ul style="list-style-type: none"><li>• staff who will always be willing to listen to your concerns</li><li>• staff available to respond to your telephone requests in a responsive and professional manner</li><li>• staff willing to assist you locate personal support services you may require as your needs change over time</li><li>• our commitment to engage with you in a respectful and friendly way in everything we do</li></ul>
<p>8.2 Are optional services provided or made available to residents on a user-pays basis?</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, the list of current services and fees is attached.</p> <ul style="list-style-type: none"><li>• 24hr emergency monitoring system. Monthly monitoring fee applies</li><li>• Gardening of resident's private courtyards. Fee applies</li></ul>

## 9. Entry costs and departure entitlement

- 9.1 Residents entering under a *Retirement Village Act 1986* on a lifetime Lease must pay:
- a **refundable** in-going contribution
  - a **non-refundable** in-going contribution

### **A small number of units are offered under different terms**

- Residents entering the village on a lease under the *Residential Tenancies Act 1997* must pay:
- 2 weeks Rent in Advance and
  - A bond equal to 4 weeks Rent

- 9.2 **Under the Retirement Villages Act 1986 (RV Act)** if the resident must pay a refundable in-going contribution:

- the range is:
  - Level 1. **\$165,000** - (assets less than \$245,000 in cash, shares, superannuation or property)
  - Level 2. **\$220,000** - (assets greater than \$245,000 but less than \$490,000 in cash, shares, superannuation or property)
  - Level 3. **\$340,000** - (assets greater than \$490,000 in cash, shares, superannuation or property)

It is refunded:

- 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.

### **Under the Residential Tenancies Act 1997, (RTA)**

Bond refunds:

- No Ingoing Contribution is payable
- A Bond equal to 4 weeks rent is payable and refunded unless we make a claim due to damage or other reasons allowed under the *Residential Tenancies Act 1997*
- Within 10 days of the rental agreement ending we will start the bond claim process with the Residential Tenancy Bond Authority
- If we disagree with the renter about a claim we make on the bond, either party can apply to VACT to resolve the dispute. For more information:

		<ul style="list-style-type: none"> <li>• <a href="https://www.consumer.vic.gov.au/housing/renting/rent-bond-bills-and-condition-reports/bond/bond-claims-and-refunds">https://www.consumer.vic.gov.au/housing/renting/rent-bond-bills-and-condition-reports/bond/bond-claims-and-refunds</a></li> <li>• <a href="https://tenantsvic.org.au/advice/common-problems/bond/">https://tenantsvic.org.au/advice/common-problems/bond/</a></li> </ul>
9.3	<p>If the resident must pay a <b>refundable</b> in-going contribution, is a fee deducted at permanent departure?</p> <p>If yes, the departure fee is based on:</p> <p>(not applicable to RTA leases)</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>Level 1.</b> 15% per annum - until consumed:  <b>Level 2.</b> 10% per annum - for a maximum number of 6 years of residence:  <b>Level 3.</b> 5% per annum - for a maximum number of 6 years of residence:</p> <ul style="list-style-type: none"> <li>• of your in-going contribution</li> </ul>
9.4	<p>If the resident must pay a <b>non-refundable</b> in-going contribution, the amount is:</p> <p>(not applicable to RTA leases)</p>	<ul style="list-style-type: none"> <li>• \$1,000 for a contribution capped at \$1,000 towards the Manager's legal costs (payable at commencement)</li> </ul>
9.5	<p>These costs must be paid by the resident on permanent departure, or are deducted from the refundable in-going contribution:</p> <p>(not applicable to RTA leases)</p>	<ul style="list-style-type: none"> <li>• A contribution to the long-term maintenance fund of:</li> <li>• \$2,000 per annum - for a maximum of 5 years of residence</li> <li>• Renovation of the interior surfaces of your unit</li> </ul>
9.6	<p>The estimated sale price ranges for all classes of units in the village (on a reinstated or renovated basis) as at 1 October 2018 are:</p>	<ul style="list-style-type: none"> <li>• 2 bedroom unit: \$165,000 to \$340,000</li> </ul>

## 10. Ongoing charges

10.1	The current rates of ongoing charges for new residents entering a lifetime lease under the RV Act:	
	<b>Type of unit</b>	<b>Service charge (Reviewed Annually)</b>
	Self-contained unit:	<ul style="list-style-type: none"> <li>• \$366.30 per fortnight (RV contracts)</li> </ul>
	Other: RTA lease:	

## 11. Financial management of the village

11.1	<ul style="list-style-type: none"><li>The village operating surplus or deficit for the last financial year is:</li></ul>	\$5,475 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?  If yes: <ul style="list-style-type: none"><li>the balance of the maintenance fund at the end of the last financial year was:</li></ul>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  \$28,516

## 12. Capital gains or losses

If the unit is sold, does the resident share in any capital gain or loss?  (not applicable to RTA leases)	<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?  If yes, the resident must pay for:  (not applicable to RTA leases)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If you pay level 2 or 3 Ingoing Contribution  <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <ul style="list-style-type: none"><li>If you pay level 1 Ingoing Contribution or</li><li>If you are on a RT Act lease</li></ul> <ul style="list-style-type: none"><li>Patching and painting any marked surfaces</li><li>Cleaning or replacement of floor coverings (e.g. carpet and vinyl)</li><li>Cleaning or replacement of all kitchen surfaces and appliances</li><li>Cleaning or replacement of all bathroom and laundry surfaces</li><li>Repair or replacement of any damaged fitting or fixture within unit</li></ul> <hr/> <ul style="list-style-type: none"><li>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.</li></ul>
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## 14. Insurance

14.1	Is the village owner or manager responsible for arranging any insurance cover for the village?  If yes, the village owner or manager is responsible for these insurance policies:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  <ul style="list-style-type: none"><li>• Buildings Cover</li><li>• Public Liability Cover</li></ul>
14.2	Is the resident responsible for arranging any insurance cover?  If yes, the resident is responsible for these insurance policies:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No  <ul style="list-style-type: none"><li>• Contents Cover on their possessions, if they wish.</li></ul>

## 15. Security

Does the village have a security system?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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## 16. Emergency system

Does the village have an emergency help system?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
If yes: <ul style="list-style-type: none"><li>• the emergency help system details are:</li></ul>	Emergency help system available upon resident's request, via MEPACS. Resident responsible for monthly monitoring fee.
<ul style="list-style-type: none"><li>• the emergency help system is monitored between:</li></ul>	24 hours a day, 7 days a week.

## 17. Resident restrictions

17.1	Are residents allowed to keep pets?  If yes, any restrictions or conditions on pet ownership are available on request.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
17.2	Are there restrictions on <b>residents'</b> car parking in the village?  If yes, details of parking restrictions are available on request.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

17.3 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 Uniting (Victoria & Tasmania) 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?

- No Fee

**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 **1 January 2024**.