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Kirkpatrick 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 or 1800 329 133

Factsheet for Loan-Lease 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:	Kirkpatrick Village 10-14 Orion Street, Vermont 3133
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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):	Uniting (Victoria & Tasmania) Limited Level 4, 130 Lonsdale Street, Melbourne 3000 ABN: 81 098 317 125
2.2	Year construction started:	1972

3. Management

3.1	<ul style="list-style-type: none">Name of company or organisation that manages the retirement village:ABN:Address:Telephone number:Date company or organisation became manager:	Uniting (Victoria & Tasmania) Limited 81 098 317 125 Level 4, 130 Lonsdale Street, Melbourne 3000 1800 329 133 29 January 2021
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 is:	<ul style="list-style-type: none">Lease (non-owner resident)
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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">6 one-bedroom units6 in total
5.2	Garages, carports or carparks:	<input type="checkbox"/> Each unit has its own garage or carport <input type="checkbox"/> attached to the unit <input type="checkbox"/> separate from the unit.

☒ Each unit has its own car park space

☐ adjacent to the unit

☒ separate from the unit.

☒ General car parking is available in the village for residents and visitors.

☐ Other (*specify*)

☐ No garages, carports or car parking are provided.

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.

- Community room
- BBQ area outdoors

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

	<ul style="list-style-type: none"> • 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 for gas, water and electricity • payment of water service charges • repairs and maintenance to all units including fixed appliances • payment of council rates and charges for all 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	<ul style="list-style-type: none"> • 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?	<input checked="" type="checkbox"/> Yes No If yes, the list of current services and fees is attached. <ul style="list-style-type: none"> • 24/7 Personal Alarm Service • Private Gardening • Uniting Home Care Support Service Referral

9. Entry costs and departure entitlement

9.1 The resident must pay:	<ul style="list-style-type: none"> • a refundable in-going contribution \$175,000
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		<ul style="list-style-type: none"> a non-refundable contribution \$1000
9.2	<p>If the resident must pay a refundable in-going contribution, it is refunded:</p> <ul style="list-style-type: none"> within 14 days of the next resident taking possession of the unit, or within 14 days of receipt of the next in-going contribution, or at the expiration of six months of permanent departure <p>whichever is the earliest</p>	
9.3	<p>If the resident must pay a refundable in-going contribution, is a fee deducted at permanent departure?</p> <p>If yes, the departure fee is based on</p>	<p><input checked="" type="checkbox"/> Yes No</p> <ul style="list-style-type: none"> 6% per annum for a maximum of 8 years of residence on your ingoing contribution
9.4	<p>If the resident must pay a non-refundable in-going contribution, the amount is:</p>	<ul style="list-style-type: none"> \$1,000 for a contribution towards the Manager's legal costs (payable at commencement)
9.5	<p>These costs must be paid by the resident on permanent departure, or are deducted from the refundable in-going contribution:</p>	<ul style="list-style-type: none"> A contribution to the long-term maintenance fund of: <ul style="list-style-type: none"> <input type="checkbox"/> \$2,000 per annum – for a maximum of 5 years of residence Reinstatement or renovation of your unit. Details outlined below in Section 13
9.6	<p>The estimated sale price ranges for all classes of units in the village (on a reinstated or renovated basis) as currently:</p>	<ul style="list-style-type: none"> one-bedroom unit: \$175,000

10. Ongoing charges

10.1 The current rates of ongoing charges for new residents:	
Type of unit	Maintenance charge
Self-contained unit: one-bedroom	<ul style="list-style-type: none"> \$213.88 per fortnight <p>New maintenance charges are usually implemented on 1 January each year following the Annual Resident Meeting in accordance with the Retirement Village Act 1986.</p>

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: 	<ul style="list-style-type: none"> \$20,153 deficit
11.2	Does the village have a long-term maintenance fund?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

If yes:

- the balance of the maintenance fund at the end of the last financial year was:

• \$10,340

12. Capital gains or losses

If the unit is sold, does the resident share in any capital gain or loss? ☐ Yes ☒ No

13. Reinstatement or renovation of the unit

Is the resident responsible for reinstatement or renovation of the unit on permanent departure? ☐ Yes ☒ No

14. Insurance

14.1 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

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	No
17.2	Are there restrictions on residents' car parking in the village? If yes, details of parking restrictions are available on request.	<input checked="" type="checkbox"/> Yes	No
17.3	Are there any restrictions on visitors' car parking in the village? If yes, details of parking restrictions are available on request.	<input checked="" type="checkbox"/> Yes	No

18. Accreditation

Is the village accredited:	
<ul style="list-style-type: none"> under the Lifemark Village Scheme (administered by The British Standards Institution and initiated by the Property Council of Australia)? 	Yes <input checked="" type="checkbox"/> No
<ul style="list-style-type: none"> by the Australian Retirement Village Association? 	Yes <input checked="" type="checkbox"/> No
<ul style="list-style-type: none"> under the International Retirement Community Accreditation Scheme (administered by Quality Innovation Performance and initiated by Leading Age Services Australia)? 	

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 not to 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*.