



103-111 Koroit Street Warrnambool VIC 3280

Postal: PO Box 365 Warrnambool VIC 3280

Ph: (03) 55615565

Fax: (03) 5561 5011

Email: admin@heatherliehomes.com.au

Web: www.heatherliehomes.com.au

HEATHERLIE HOMES (Koroit St)

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:	Heatherlie Homes 103-111 Koroit Street WARRNAMBOOL VIC 3280
---	---

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) 130 Little Collins Street MELBOURNE VIC 3000
--	--

2.2 Year construction started:	1979
--------------------------------	------

3. Management

3.1	<ul style="list-style-type: none">Name of company or organisation that manages the retirement village: Heatherlie Homes, an unincorporated agency of The Uniting Church in Australia Synod of Victoria and TasmaniaABN: 29 263 185 760Address: 103-111 Koroit Street Warrnambool VIC 3280Telephone number: (03) 5561 5565Date company or organisation became manager: 1979
-----	--

3.2	Is there an onsite representative of the manager available for residents? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	If yes, the onsite representative is available on these days: <ul style="list-style-type: none">Monday from 9am to 5pmTuesday from 9am to 5pmWednesday from 9am to 5pmThursday from 9am to 5pmFriday from 9am to 5pm

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:

- 73 one-bedroom units
- 2 two-bedroom units
- 2 other (*specify*) - respite
- 77 in total

5.2 Garages, carports or carparks:

- ~~Each unit has its own garage or carport~~
 - ~~attached to the unit~~
 - ~~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*) – Subject to payment of a licence fee of \$15,000, availability and prior arrangement with the Manager, a limited number of garage spaces are available for resident parking.
Note: The licence fee is refundable once the garage space is no longer required by the resident.
- ~~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.

- BBQ area outdoors
- Communal laundries
- Other (*specify*) – Separate residents lounge; computer hub and library

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):
- Cleaning and maintenance of communal areas and facilities;
 - Payment of council rates and charges for all areas;
 - Payment of gas, electricity, water and other utilities for all areas;
 - Building reinstatement insurance;
 - Public Liability insurance in all areas;
 - Employee Insurance;
 - Gardening, lawn mowing and landscaping of the communal areas;
 - Garbage and Waste collection from the village;
 - Cleaning and lighting of communal areas;
 - Maintenance and repair of all areas unless caused by residents;
 - Management and administration services

8.2 Are optional services provided or made available to residents on a user-pays basis?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Description	Cost
	Respite Accommodation – located at 103-111 Koroit Street Warrnambool	Subject to availability, \$60 per night
	Linen services – respite units only	\$5 per bed /night
	Housekeeping/cleaning services	\$25 per hour

9. Entry costs and departure entitlement

9.1	The resident must pay:	<ul style="list-style-type: none"> a refundable in-going contribution
9.2	If the resident must pay a refundable in-going contribution:	<ul style="list-style-type: none"> the amount is: <ul style="list-style-type: none"> \$126,500 for a 1 bedroom unit (Includes \$91,500 Ingoings, a \$30,000 Interest Free Loan and \$5,000 damages bond) or \$178,500 for a 2 bedroom unit (Includes \$143,500 Ingoings, a \$30,000 Interest Free Loan and \$5,000 damages bond)
	It is refunded:	<ul style="list-style-type: none"> other (<i>specify</i>): <ul style="list-style-type: none"> The earliest of: <ul style="list-style-type: none"> 14 days of receipt of the next in-going contribution; 14 days of the next resident taking possession of the unit; and 6 months of permanent departure.
9.3	If the resident must pay a refundable in-going	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

contribution, is a fee deducted at permanent departure?

If yes, the departure fee is based on:

- other basis (*specify*):

For a 1 bedroom unit:

- 12% of your ingoing contribution deducted annually, for each year or part of a year (calculated on a pro rata monthly basis) from the date you occupy your unit for a maximum of 6 years.

For a 2 bedroom unit:

- 13.4% of your ingoing contribution deducted annually, for each year or part of a year (calculated on a pro rata monthly basis) from the date you occupy your unit for a maximum of 6 years.

9.5 These costs must be paid by the resident on permanent departure, or are deducted from the refundable in-going contribution:

- Other costs (*specify*)
 - costs to repair any damage to the unit caused or contributed to by you other than fair wear and tear; and
 - any Maintenance Charges and other moneys owed by you under your contract or otherwise and any GST the Owner or Manager is liable to pay on these moneys.

9.6 The estimated sale price ranges for all classes of units in the village

- Not applicable

10. Ongoing charges

10.1 The current rates of ongoing charges for new residents:

Type of unit	Service charge	Long term maintenance fund charge
Self-contained unit:	<ul style="list-style-type: none"> • \$786.00 per calendar month (single person in 1 bedroom unit) • \$853.00 per calendar month (couple in 1 bedroom unit) 	

- \$923.00 per calendar month (2 bedroom unit)

Note: the above amounts are reviewed annually subject to the Retirement Villages Act

11. Financial management of the village

11.1 • The village operating surplus or deficit for the last financial year is: \$60,394 deficit

11.2 Does the village have a long-term maintenance fund? Yes No

12. Capital gains or losses

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

The village is not strata titled

13. Reinstatement or renovation of the unit

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

If yes, the resident must pay for:

Costs to repair damage or in order to bring the unit to the standard required in the residence and management contract (fair, wear and tear excepted).

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:

- Public Liability Insurance
- Building Reinstatement Insurance
- Employee Insurance
- Professional Indemnity Cover

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

If yes, the resident is responsible for these insurance policies: Household contents insurance - recommended

15. Security

Does the village have a security system? Yes No

If yes:

- the security system details are: 16 security cameras
- the security system is monitored between: 24 hours a day, 7 days per week.

16. Emergency system

Does the village have an emergency help system? Yes No

17. Resident restrictions

17.1 Are residents allowed to keep pets? Yes No

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

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

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

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 25 October 2019.

HEATHERLIE

