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# RETIREMENT VILLAGE CHECKLIST

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## 1. LOCATION OF THE VILLAGE

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- Is it in your preferred area/suburb?**
- Is it near family/friends or is it easy to travel to family/friends from the retirement village?
- Is it close to a shopping centre, supermarket, cafes/restaurants, library, church and/or club that you may be a member of?
- Is it close to public transport and/or is there a village bus (or other transport) that goes to the local shopping centre etc.?
- Are there medical services (doctor, chemist etc.) and/or a hospital nearby?
- How long would it take to get to a hospital in an emergency situation?

## 2. THE VILLAGE – LAYOUT, ACCESSIBILITY, SERVICES AND LIFESTYLE

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- Do you like the design and layout of the unit? Would it require modification (e.g. installing shower rails etc.) if your needs/abilities change? Will it allow you to 'age in place' if so desired?
- Will the unit be a comfortable place to live? What are the cooling/heating options? Have you budgeted for the cost of that cooling/heating?
- Are you permitted to make any changes to your unit or redecorate your unit?
- Is the unit adequately secured? For example, are deadlocks and monitored alarms installed?
- Is the village well maintained?
- Does the village have a sufficient number of suitably qualified staff to provide the services you may require? When are staff members on duty?
- Is there 24-hour medical assistance available or an emergency medical call-out service if required?
- Does the village have adequate security, including security measures such as well-lit paths and common areas?
- What facilities are there? Are they adequate to meet your lifestyle and leisure needs? For example, swimming pools, tennis, fitness centre, cinema, workshop, community centre, on-site hairdressing salon etc.
- If you have a garden attached to your unit, are you able to do your own gardening if you so desire? If not, will the village gardener also attend to your garden area? Is there a communal garden where you are permitted to garden if you so choose?
- Is there adequate parking for all residents and a designated area for visitor parking? Are you able to easily access your unit from your designated parking area/space? In the event of inclement weather, can you access the unit from the parking area without getting wet etc.? Are there restrictions on where visitors may park?
- Is there a limit on the length of time that visitors may stay with you?
- Are the paths designed to provide easy access to your unit and the amenities of the village?
- Can the village organise meal delivery to your unit? At what cost?

- Do any other services (e.g. mobile library, hairdresser, pet groomers etc.) visit the village?
- Do any medical services providers (e.g., physiotherapist, occupational therapist etc.) visit the village on a regular basis? How difficult is it to get an appointment with the provider?
- What internet and paid television services are available? Who is responsible for the cost?
- Do you play a musical instrument? Are there restrictions on playing your instrument in your unit due to noise issues etc? Is there a music room or similar available for you to play your instrument without disturbing other residents?
- Are you a smoker? Are you permitted to smoke in your unit? Is there a designated smoking area within the village? If you are permitted to smoke in your unit, is there a requirement in the reinstatement obligations to replace carpets or other floor coverings regardless of how long you live in the unit?
- Do you intend to run a business from your unit? Are there any restrictions on running a business from your unit?

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### 3. ACTIVITIES

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- Have you been provided with a list of activities offered at the village? Are there activities that suit your hobbies/interests?
- Is the cost of the activities included in the monthly/fortnightly fees or do some activities incur an additional cost?
- Can visitors participate in any of the activities?
- Where do the activities take place? Do you like the look/feel of the community area? Will you want to spend your time there?

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### 4. BECOMING A PART OF THE VILLAGE COMMUNITY

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- Is there a residents' committee? Have you met any members of the committee?
- Have you seen a copy of the committee's rules? How is the committee involved in the operation of the village? What impact can it have on the operation of the village?
- Have you spoken to any of the residents and asked them about the village and what activities are available? What opportunities are available for you to socialize and meet other members of the village?
- Have you asked any residents about any issues they have with their unit, whether or not the village is well maintained, how responsive are the members of staff etc.?
- Do you think you will enjoy being a part of the community? Is it a good 'fit' for you? What are the demographics of the community?
- Have you met the on-site manager? Do you think you will get along well?

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### 5. PETS AND COMPANION ANIMALS

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- Are you allowed to keep a pet in your unit? Are there any restrictions on the type/breed of dog/cat?
- Are there any restrictions on where your animal can be within the village? For example, can they be in any of the common areas?
- Are you allowed to add a new pet after you move into your unit? For example, if the pet you brought with you to the village passes away, are there any restrictions on a new pet?

- Is there a requirement in the reinstatement obligations to replace carpets or other floor coverings regardless of how long your dog/cat lives in the unit?

## 6. OPTIONS FOR 'AGING IN PLACE' OR IF HEALTH DETERIORATES

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- Does the village offer government funded aged care services to allow 'aging in place'? If so, are you happy with their provider or will the village assist you to find a different provider?
- What disability access and design features does the unit contain? Are the showers, doorways and toilets suitable to wheelchair access?
- Is there aged care residential accommodation on-site or located nearby? How many aged care places are available at the on-site or co-located residential accommodation? What is the average waiting time to get a place in the aged care accommodation?

[Note: a retirement village operator **cannot** promise that accommodation will be available in any on-site or co-located aged care residential facility. Availability will be assessed at the relevant time by the aged care provider – the retirement village operator will not be involved in this process.]

## 7. LEGAL AND FINANCIAL REVIEW AND ADVICE

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- Has a lawyer reviewed the contract and all the disclosure documents provided by the village?
- Do you understand what fees and other expenses will be incurred under the contract? Can you afford the ongoing costs (in addition to the costs of entering the village)?
- Do you understand the nature of your right to reside in the unit (e.g. leasehold vs. licence etc.)?
- Is the village operator part of a voluntary accreditation scheme? If not, why not? Are you satisfied with the answer?
- Have you sought independent financial advice and understand the implications on your financial situation including any impact on any age pension or other government assistance?
- Should you terminate your residency contract (for example, if you move into residential aged care), it may be up to 18months before you receive your exit entitlement. Have you considered how you or your family will cover the residential accommodation costs of your aged care and the general service charges payment under your residency contract with the retirement village until you receive your exit entitlement?

***YOU SHOULD NOT ENTER INTO AN AGREEMENT OR CONTRACT TO PURCHASE A RIGHT TO RESIDE IN A RETIREMENT VILLAGE WITHOUT FIRST HAVING A TRUSTED FAMILY MEMBER OR FRIEND VISIT AND REVIEW THE VILLAGE AND THE UNIT YOU ARE CONSIDERING.***

***YOU SHOULD ALSO OBTAIN INDEPENDENT LEGAL AND FINANCIAL ADVICE FROM A SUITABLY QUALIFIED ADVISER BEFORE SIGNING ANY CONTRACT OR AGREEMENT.***