

# Retirement / Lifestyle Village Checklist

Use this as a reference.  
You may wish to either tick if it applies, add 'yes' or 'no' or give a personal rating from 1-5 to help compare your options.

		1	2	3	4
	<b>Village Name(s)</b>				
	<b>Street / Suburb</b>				
	<b>Phone</b>				
	<b>Date Visited</b>				
<b>Financial</b>	Entry Price? (eg. \$570,000)				
	Weekly Fee Cost? And is it Fixed (F), CPI linked (CPI) or Inceasable by Operator (I)? (eg. \$120, F)				
	Maximum DMF (Deferred Management Fee)? Over how many years? (eg. 25%, 5 years)				
	Share of Capital Gain? Exposed to Capital Loss? (eg. Yes - 50%, No)				
	Fees for Transferring to another unit, if required? Does a 2nd DMF apply?(eg. \$1000, No)				
<b>Location</b>	Near friends, family? (eg. Yes)				
	Close to shops, transport, church, social clubs etc. (eg. Some)				
	Is it on flat land? Do internal roads, kerbs & footpaths have easy walker access? (eg. Yes)				
	Nice green spaces? Gardens?				
	Proximity from unit to village community centre?				
<b>Social / General</b>	Are there social activities that appeal?				
	Are staff / management approachable / friendly?				
	Were other residents friendly?				
	Is there a residents committee?				
	Overall atmosphere in the village?				
<b>Care</b>	Are there support services? Call bell? Care onsite?				
	What do these services cost?				
	Is there respite or short term care offered as part of your ORA?				
	What levels of care are offered, if required?				
	Do residents get priority for any care services onsite?				
<b>On Exit</b>	When do fees stop? (eg. On exit)				
	When is capital returned? (eg. On sale of unit)				
	What if it doesn't sell? (eg. Repay 20% in 3 months)				
	Any costs for refurbishment? (eg. No)				
	Any other costs I should know about? (eg. admin fees)				
<b>Current Rating Score on <a href="http://www.agedadvisor.nz">www.agedadvisor.nz</a>? Do they have any Peoples Choice Awards?</b>					